



Arab Social Media Report



كلية دبي للإدارة الحكومية
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The *Arab Social Media Report* series aims to inform a better understanding of the impact of social media on development and growth in the Arab region by exploring the following questions:

- What are the penetration trends of social networking services in the Arab region?
- What is the growth rate, and what is the demographic and gender breakdown?
- What factors affect the adoption of these platforms in different Arab countries (e.g., income, youth population, digital access, Internet freedom, etc.)?
- What is the impact of these phenomena on citizen engagement and social inclusion?
- What is the impact of the new social dynamics influenced by social media on innovation and entrepreneurship in Arab societies?

Ultimately, we hope that the report findings shed light on the role social media is playing in the societal transformations taking place in the Arab world.

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Social Media in the Arab World: Influencing Societal and Cultural Change?

Overview

The passionate debate on the impact of social media in the Arab world has continued throughout 2011 and 2012. However, it has largely moved beyond the classical polarized perception of the rigid paradigms of technologically deterministic views and the overly-romanticized 'people power' ones. The healthy debate that has dominated policy discourses for more than a year has finally shifted the question of the societal impact of social media usage from the "if" to the "how", "why" and "what next". Throughout the past two years, the Arab Social Media Report series has been a key contributor to this global debate, providing the only regional source of quantitative research on the growth and usage trends of social media in the Arab region, coupled with exploratory qualitative surveys that dig deeper into regional perceptions regarding the impact of social media in Arab societies. The findings of the report series covered topics varying from the impact of social media on freedom of expression and media consumption behaviors, to its empowerment of youth and women, and its role in popular civic movements. In this fourth issue of the report, we focus on exploring the societal and cultural transformations taking place in the Arab region, influenced by the continuing exponential growth of social media. In this edition of the report we provide regional statistics on more social networking platforms, in addition to Facebook and Twitter; including for the first time, analysis on LinkedIn. The findings of the regional survey provided here aims to measure emerging perceptions of social media users in the Arab World on identity and culture, a topic that is closely linked with several critical policy questions in the region, and begs for more research on a regional and individual society levels.

1. Introduction

The ongoing popular political and civic movements in the Arab world have empowered large segments of the region's population. Policy making circles continue to debate the impact of social media at the Arab regional as well as global levels. The continued strong growth, popularity and diversity of social media usage across the region throughout the first half of 2012 –well beyond the height of the 'Arab spring'- indicates that the popular movements sweeping the region were not the only contributing factor to this growth, and that a more organic growth is taking place, impacting Arabs connections with their society and community.

Specifically, where we once witnessed a shift in the type of social media usage across the region from social to political usage, we now see a wider scope of uses for social media in the region, ranging from civic engagement and political participation to business entrepreneurial efforts, and social change. With a critical mass of Arab users in many countries, governments in the region have also begun to recognize -and accept- social media's potential. Several governments in the region are viewing this as an opportunity contributing to development a more transparent, participatory and inclusive governance models. From merely being used as a tool for social networking and entertainment, social media now infiltrates almost every aspect of the daily lives of millions of Arabs, affecting the way they interact socially, do business, deal with government, or engage in civil society movements.

Previous issues of the *Arab Social Media Report* have explored the growth of social media in the region, and the change in the nature of social media usage, all of which has been partly fueled by the use of networks such as Facebook, YouTube and Twitter in the movements of the so-called "Arab spring." The fourth edition of the report builds on these timely themes, which specifically explored the exponential growth of social media use in the Arab world; the role of social networking tools in the civil movements in the Arab region; and the potential of social media to empower Arab women. It goes beyond this framework of the 'Arab spring' that dominated the discourse over the past year, to explore perceptions on whether the political empowerment experienced and witnessed by so many through the innovative uses of social media can transcend these specific events and be utilized in a broader context of social change within one's society, culture and community.

Produced by the Dubai School of Government's Governance and Innovation Program, the *Arab Social Media Report* series continues to analyze usage trends of online social networking tools across the Arab region. Based on data collected in the first half of 2012, this edition of the report analyzes data on Twitter and Facebook users in all 22 Arab countries, in addition to Iran, Israel and Turkey. It also introduces, for the first time, statistics on LinkedIn users in the region. Additionally, in another first-of-its-kind regional survey, this special edition of the report explores the impact of social media culture, society and identity.

Growth of Social Media Usage in 2012

The *Arab Social Media Report* series is part of a larger research initiative by the Governance and Innovation Program focusing on social engagement through ICT for better policy in Arab states, which explores the use of social networking services in governance, social inclusion and economic development. The initiative also studies the potential of social networking applications for increasing collaboration, knowledge sharing and innovation, both between and among government entities, citizens and the private sector.

The growth of social media throughout 2012 has not shown signs of slowing down, either on a global level or within the Arab region. Globally, Facebook still dominates, with over 901 million 'monthly active' users worldwide - by the end of March 2012 - of which 500 million access the Facebook platform through their mobiles. Additionally, 500 million Facebook users log in daily and 80 percent of users are located outside North America¹.

Twitter, on the other hand, reached the 500 million mark in February 2012², of which 140 million are 'active' users, generating 340 million tweets a day. About 60% of the active users produce tweets, while the remaining 40% log in just to get news and information. Much like Facebook, 70% of Twitter users reside outside the USA and 57% of users utilize their mobile devices and smartphones to access Twitter. Arabic language is the fastest growing language ever on Twitter, among 25 other different languages used on the site. To accommodate this growth, Twitter recently introduced an Arabic language interface.

As of March 2012, LinkedIn provides the world's largest professional social network on the Internet with 161 million members in over 200 countries and territories, of which 61% percent are located outside of the USA. LinkedIn members did nearly 4.2 billion professionally oriented searches on the platform in 2011. LinkedIn is currently available in seventeen languages not including Arabic. Students and recent college graduates are the fastest growing demographic on LinkedIn. Additionally, more than 60,000 developers are using its APIs to create tools and services³

Other social media sites are also exhibiting substantial growth on a global scale. As of June 2012, Google+, for example has over 170 million users, and shares over a billion items a day.. Similarity, YouTube has over 800 million unique user visits a month; these result in 60 hours of uploaded video every minute. The video sharing platform is available in 60 languages and 42 countries, and has over four billion views per day (up 50% from last year)⁴

¹ Source: Facebook - <http://newsroom.fb.com/content/default.aspx?NewsAreaId=22>

² Source: Twitter - <http://blog.twitter.com/>

³ Source: LinkedIn - <http://press.linkedin.com/about>

⁴ Source: Google

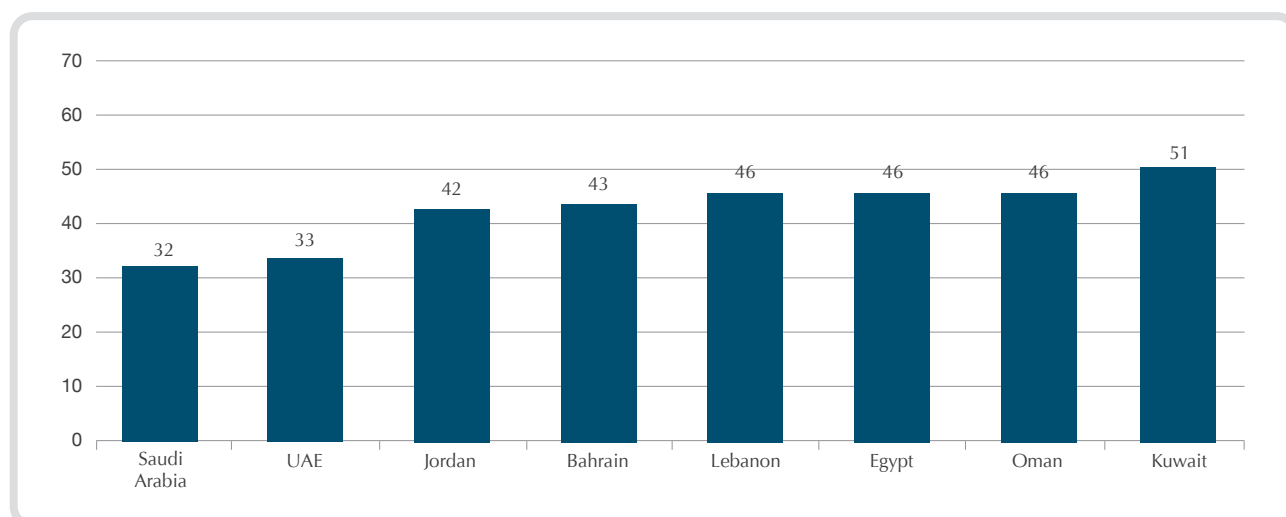
2. Social Media in the Arab Region – Towards Social and Societal Change

Throughout the Arab Social Media Report series, social media usage trends have been explored and analyzed, chronicling both an exponential growth in the number of social media users in the region, and a marked shift away from the typical social and entertainment uses of social media towards those that are more political and civic⁵. The Arab spring and related civic movements have contributed significantly to this change, although, as evidenced by further research into the impact of social media in the region beyond the ‘peak’ of these events⁶, the ongoing growth and changes have transcended the political events of last year. The number of social media users in the region continues to grow fast, and their usage of social media, influenced by the sense of empowerment and their ability to create change within their countries, has gone on to encompass efforts to address societal issues and influence social change and cultural attitudes at the society and community level among a large part of Arab societies.

To explore this continuing evolvement of social media usage in the region, a regional online survey was administered in 8 Arab countries (Bahrain, Egypt, Jordan, Kuwait, Lebanon, Oman, Saudi Arabia and the UAE)⁷, examining the usage of social media and, specifically, perceptions about its impact on culture and society in the region. The target demographic for the survey mirrored the demographic makeup of each country. Consequently, the typical respondent profile was a young professional (70% of respondents were between the ages of 18 and 30), primarily in the private sector, although the public sector, the third sector and enterprise owners were also represented, along with university students and the unemployed. The gender split was approximately 50/50. The survey was conducted between March and May 2012 and received 4754 responses, with an average response rate of 86.4%.

Several survey questions explored the bridge between the growth of social media and the resulting influence this growth has had on users’ views of - and interactions with - their communities and societies. Figure 1 below illustrates how social media users in these eight Arab countries felt empowered by their use of social media to influence change in their communities. Interestingly, this feeling of empowerment was strongly evident even in countries where social media was not directly linked to popular or political movements, such as in Kuwait and Lebanon, indicating that such movements were not the only contributing factor to people’s evolving use of social media, but rather that an organic societal change was taking place among social media users. That said, it could be argued that the largely free flow of information online and the cross-border interconnectivity and influence of social media users in the Arab region have contributed to this regional sense of empowerment within a large part of the society.

Figure 1: “Social media played a role in empowering me to influence change in my community/ country (% of respondents)”



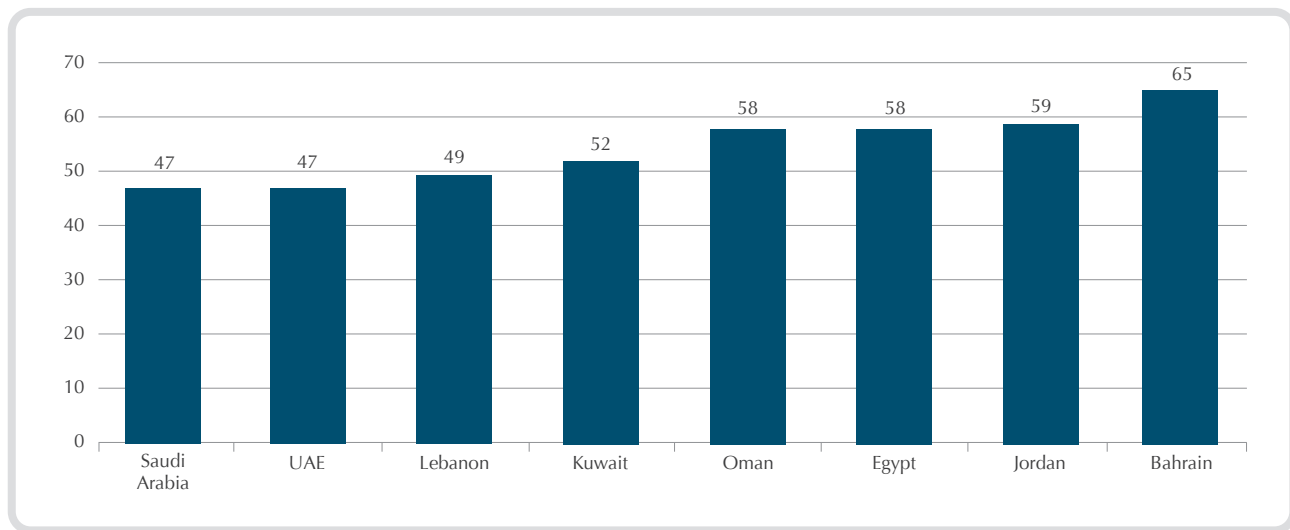
⁵ Arab Social Media Report, Vol. 1, Issue 2, 2011, Governance and Innovation Program, Dubai School of Government – www.ArabSocialMediaReport.com

⁶ The impact of social media on empowering Arab women, for example, as explored in the third issue of the Arab Social Media Report

⁷ The survey questions presented here represent a small part of a larger survey conducted by the Governance and Innovation Program in collaboration with SAP Middle East & North Africa. The full survey results will be published in 2012 in a special report on social media, unemployment and entrepreneurship in the Arab region.

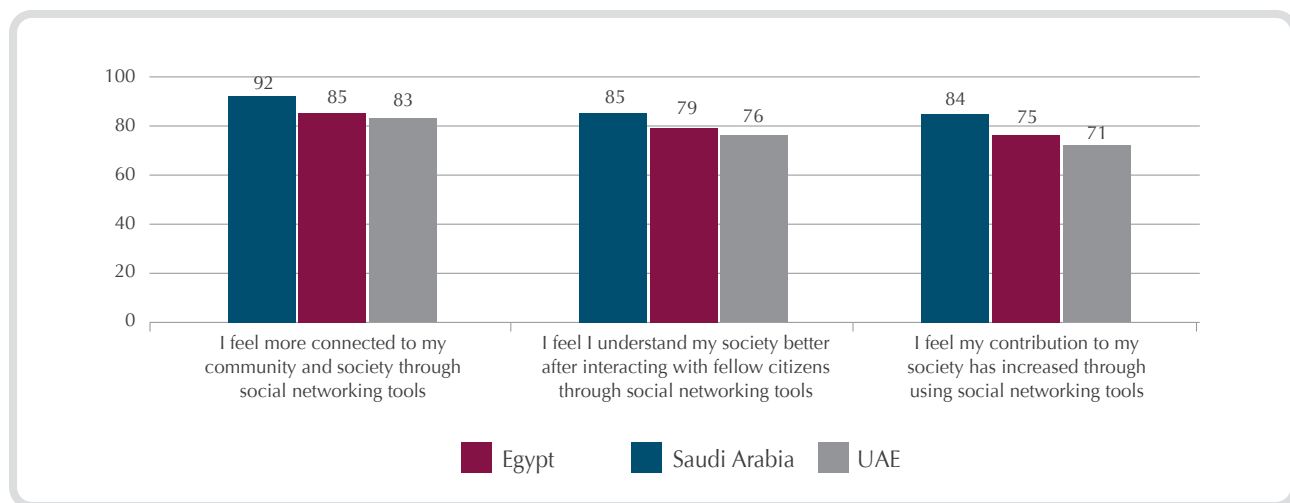
Additionally, social media did not just empower people to create social change, but, according to respondents, it created a shift in their attitudes, making them more open and tolerant of other people's points of view. (See Figure 2)

Figure 2: "I am more open to tolerating different points of view (% of respondents)"



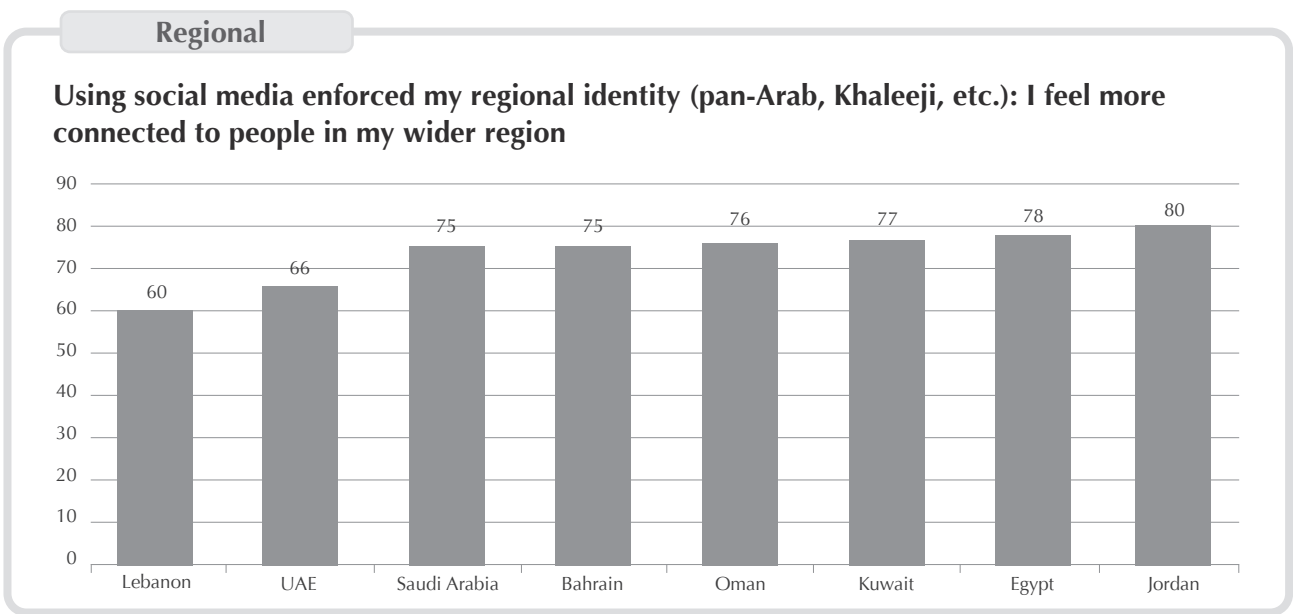
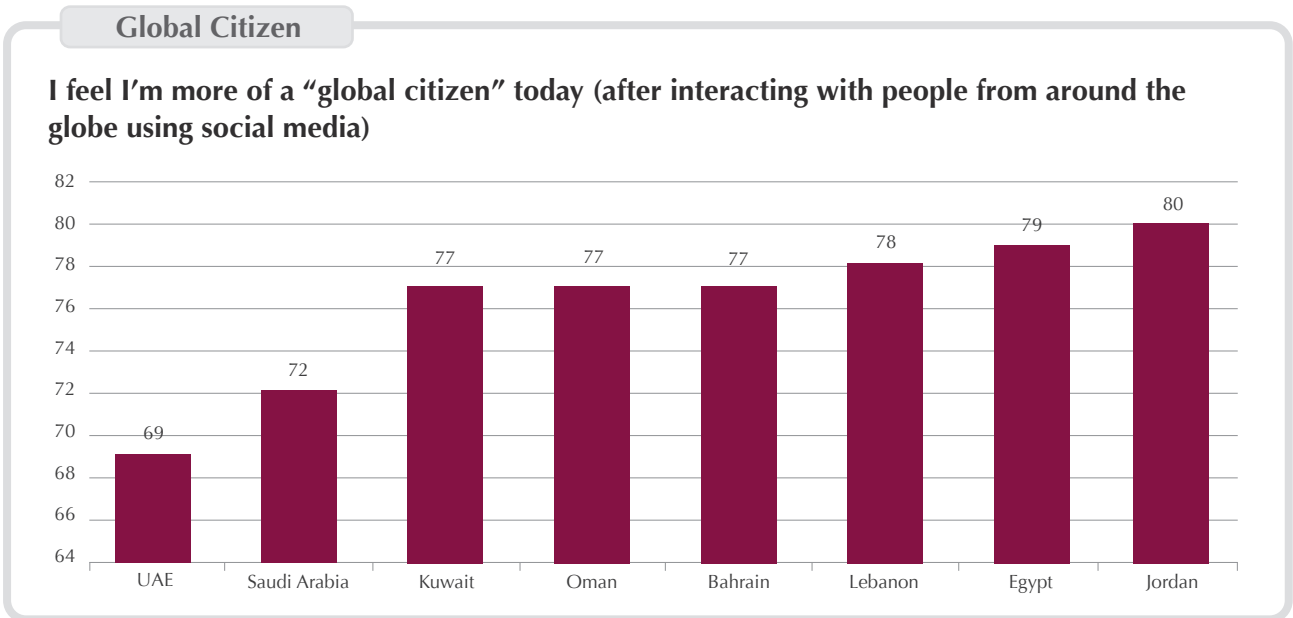
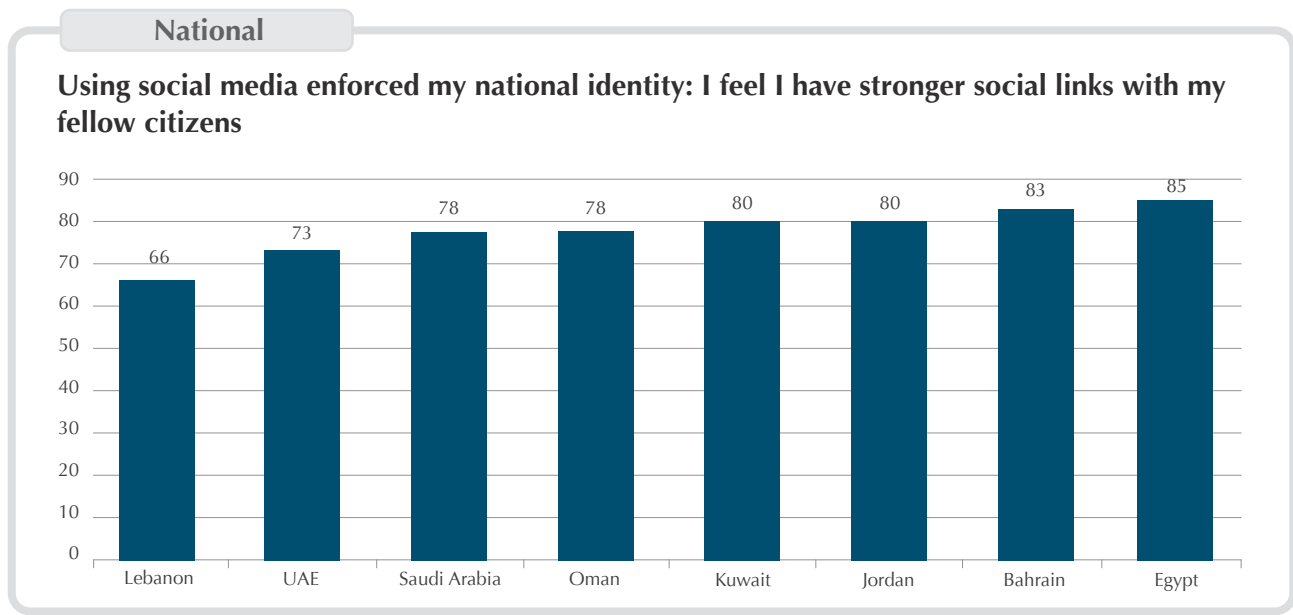
Honing in on three of the countries with the largest social media users, both in terms of penetration and numbers, (Egypt, Saudi Arabia and the UAE), we notice that respondents in all three strongly concur that their connection with, understanding of, and contribution to their societies and fellow citizens has been facilitated and enhanced through the use of social media tools. (Figure 3). Egypt had the highest percentage of agreement across all three statements, followed by Saudi Arabia and the UAE indicating a possible correlation between political uses of social media during the popular movements and the impact of social media on one's view of society.

Figure 3: "To what extent do you agree with the following statements regarding the impact of social media on your view of society (% agree)"



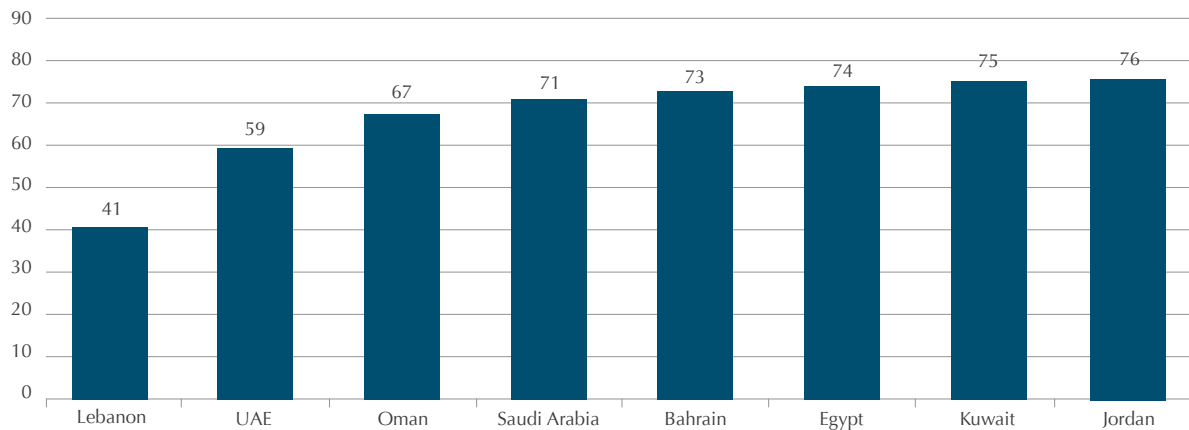
Delving further beyond impact of social media on culture and society, the survey also aimed to gauge the effect of social media use on one's identity. On average, across all eight countries surveyed, social media enforced different aspects of respondents' identities in the following descending ranking: National identity, global identity, regional identity and religious identity. Figure 4 highlights the breakdown of these different ranking between countries.

Figure 4: Using social media enforced my sense of identity (National, Global Citizen, Regional, Religious)



Religious

Using social media enforced my religious identity: I feel I have stronger social links with people from same religious background



“ Many claim that social media usage and, by association, its ability to expose people to a variety of ideas and opinions, has led them to become more open and tolerant of these views ”

2.1 Social Media, a Year after the Uprisings: Key Findings and Conclusions

- While social media usage has been influenced by the political events of the past year, its exponential growth and shift in the type of usage has not been solely due to these local events and has endured beyond them. This year has seen both a continued growth in numbers of social media users in the Arab region, and an evolution in types of usage that has built on the political empowerment brought about by social media in several Arab countries – and witnessed by others - and has grown beyond that to influence shifts in perception regarding culture, identity and the ability to impact social change.
- **Impact on society:** People's use of social media, emboldened by the political change it helped bring about throughout 2011, has become more widespread and influential on societies and communities in the Arab region. Social media users generally hold positive views on its impact on, and potential for creating social change. Ultimately, social media is being seen and used as an agent of change.
- **Impact on cultural attitudes:** On an even more personal level, social media usage is not just perceived to bring about change within communities, but within people themselves. Many claim that social media usage and, by association, its ability to expose people to a variety of ideas and opinions, has led them to become more open and tolerant of these views.
- **Impact on identity:** Social media's ability to connect people, their opinions and experiences across the globe has not only influenced a change in social media users' attitudes towards others, but has also reinforced their sense of identity within this new networked virtual community. Although the top ranking aspect or 'type' of identity reinforced by social media was the 'national' one, feeling like a 'global citizen' was a close second, and religious identity the lowest ranking, suggesting that social media may –for now- have the ability to influence a more globalized society while de-emphasizing religious differences.

3. Mapping Facebook in the Arab World – Q1 and Q2 2012

This edition of the *Arab Social Media Report* continues to explore social media usage in the Arab region, focusing on both Facebook and Twitter, in addition to the introduction of LinkedIn usage in the region for the first time. This section, specifically, provides an update on Facebook usage during the first and second quarter of 2012, building on Issue III of the report, which provided an overview of Facebook users in the second and third quarter of last year. As such, the number of Facebook users in all 22 Arab countries, in addition to Iran, Israel and Turkey, was collected periodically between January and June 2012, in the following age brackets — youth (15-29), and adults (30 and over) — as well as by gender. The key findings follow:

Penetration and uptake

Facebook in the Arab World: A Snapshot

- The total number of Facebook users in the Arab world stands at **45,194,452 (as of end June, 2012)**, up from **37,390,837** at the beginning of the year (**January 3, 2012**), having increased by about **50% since the same time last year (29,845,871 in end June 2011)**.
- By the end of June 2012, the country average for Facebook user penetration in the Arab region **was just over 12%, up from 10%** at the beginning of the year, **and up from 8% in June 2011**.
- The number of Facebook users in the Arab world **has approximately tripled in the last 2 years** (June 2010 – June 2012), increasing from **16 million users to 45 million users**. **Figures (5, 6 & 7)** illustrate the growth in all 22 Arab countries in the past 2 years.
- The percentage of **female users** remains almost static, having fluctuated slightly between 33.5% and 34% in the past year (**33.7% as of June 2012**). This is still significantly lower than the global trend, where women constitute **roughly half** of Facebook users.
- **Youth** (between the ages of 15 and 29) continue to make up **around 70% of Facebook users** in the Arab region, a number that has been holding steady since April 2011.
- **GCC countries** dominate the **top five** Arab Facebook users as percentage of population. The UAE remains at the top of the Arab region, followed by Kuwait, while Qatar has found its way back into the top five. Lebanon and Jordan take up the remaining spots.
- Egypt still constitutes about a **quarter** of total Facebook users in the Arab region, and has added more users in the past year than any Arab country, at over 1.6 million new Facebook users between January and June 2012.
- English, Arabic and French are the dominant languages on Facebook, and **Arabic is now the fastest growing language on Facebook** in the region, with an increase in the number of Facebook users who predominantly use the Arabic interface.

Figure 5: Number of Facebook Users in the Arab Region between June 2010 and June 2012 (Top 10 Facebook populations)

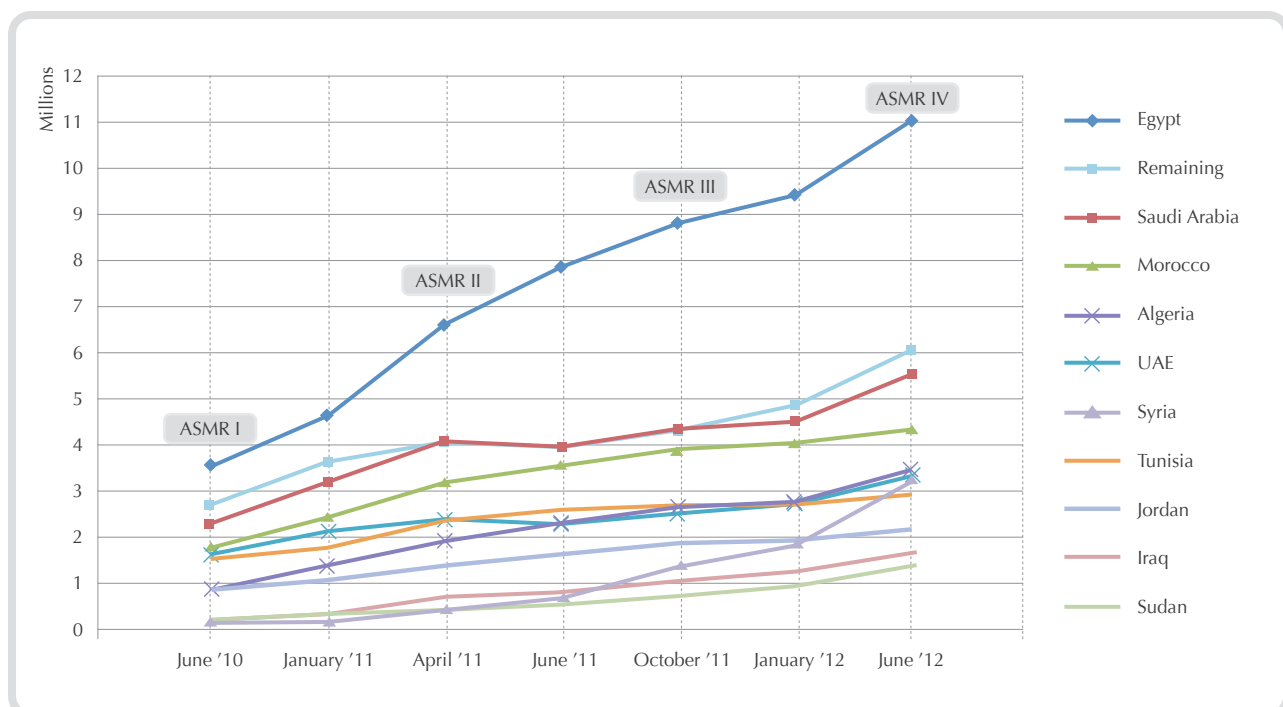


Figure 6: Number of Remaining Facebook Users in the Arab Region between June 2010 and June 2012 (excluding Top 10 Facebook populations)

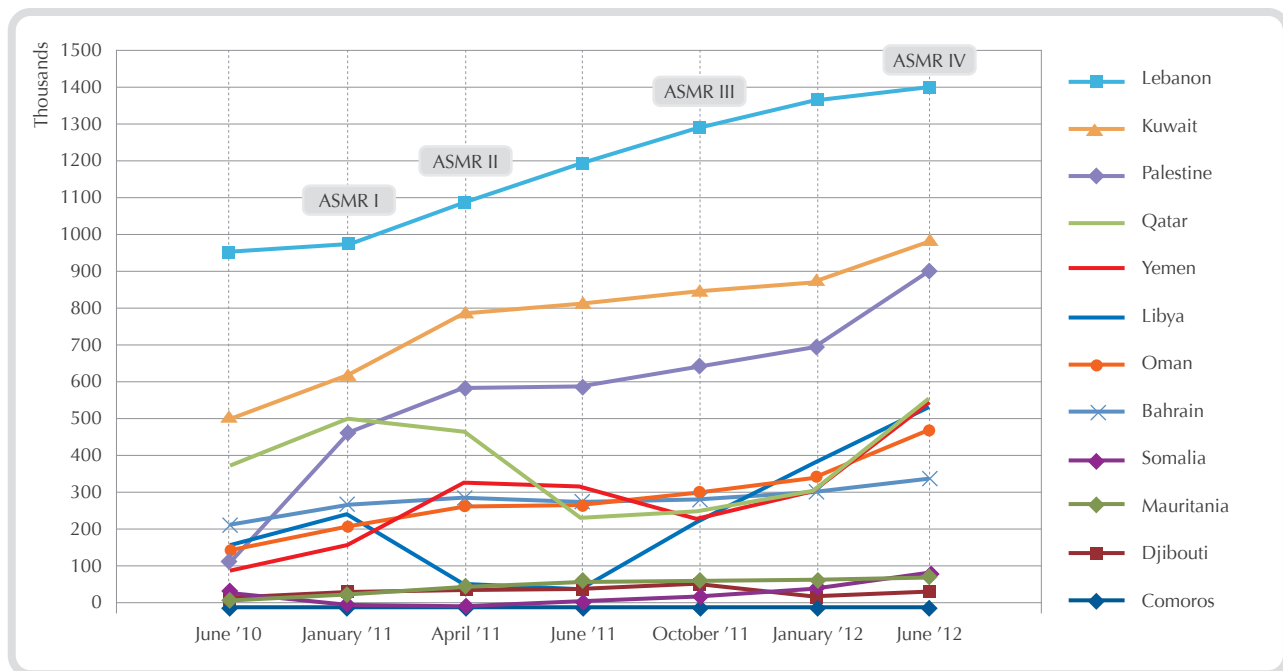
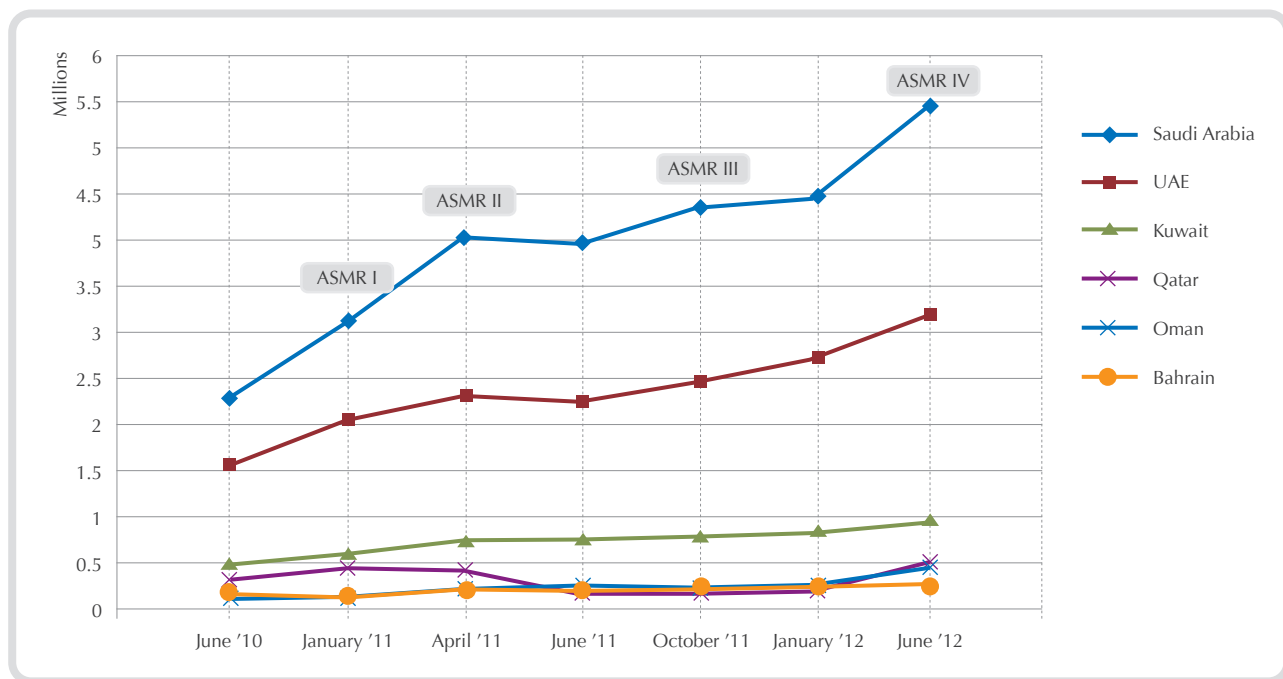


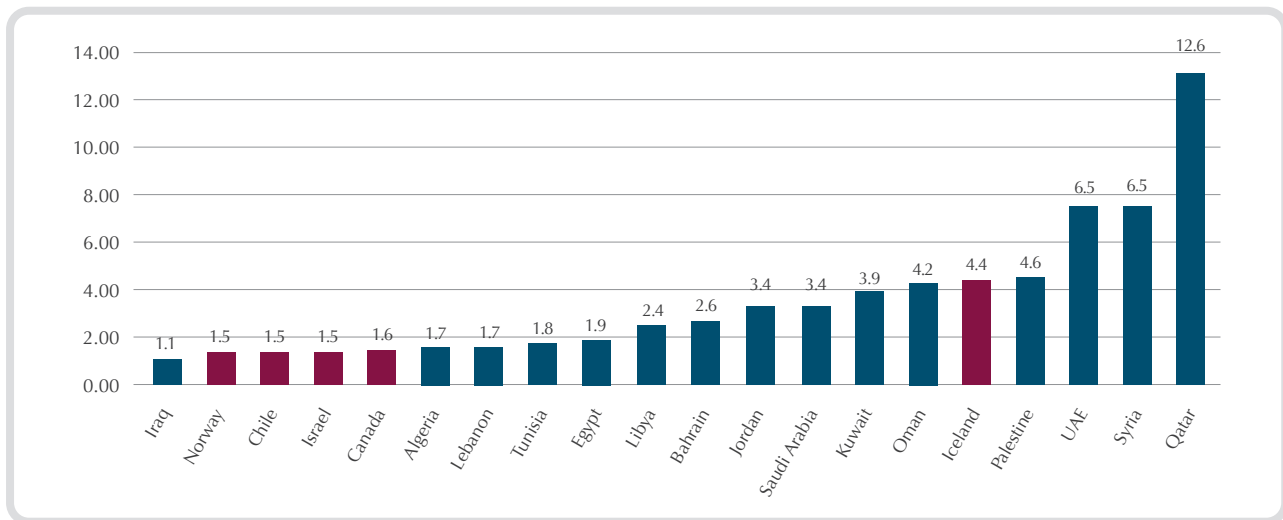
Figure 7: Number of Facebook Users in the GCC Countries between June 2010 and June 2012



When comparing the uptake of Facebook in Arab countries with that in some of the top ten countries⁸ (in terms of Facebook penetration worldwide), several Arab countries still outpace the top 10 countries in terms of new users acquired between January and June 2012, as percentage of population. For example, at the end of June 2012, fourteen Arab countries had acquired more Facebook users (as a percentage of population) than Canada, one of the highest-ranking countries in the world in terms of Facebook penetration (see Figure 8). Additionally, for the first time, Turkey ranks the lowest in the region in terms of the number of new Facebook users acquired in the first half of 2012; Turkey has in fact lost some of its Facebook users, as it is possibly reaching a saturation point. (see Figure 9).

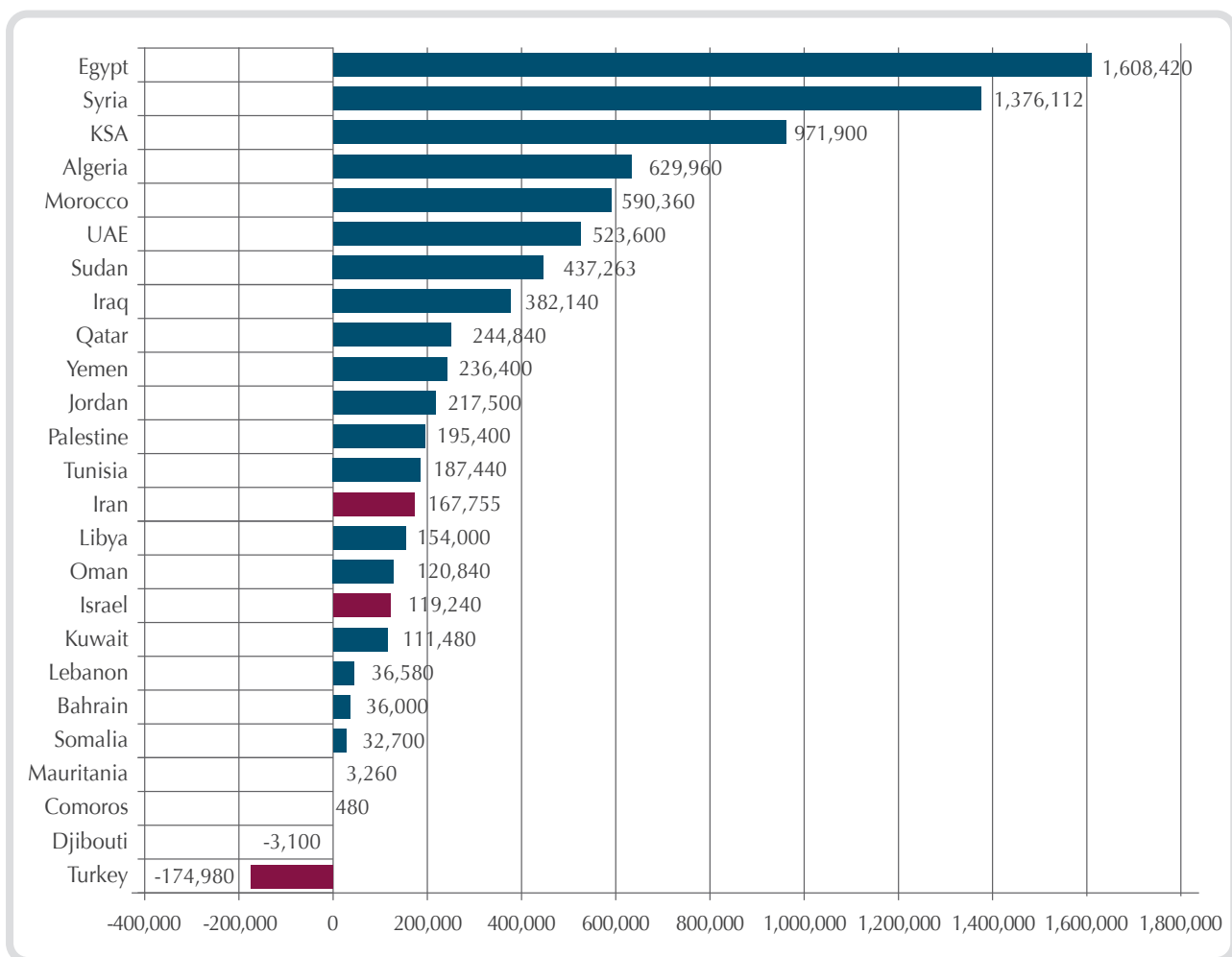
⁸ Iceland, Hong Kong, Singapore, Chile, Norway, Denmark, Canada, Australia, UK, US

Figure 8: New Facebook Users in the Arab Region and Globally (Jan. 3 – June 25, 2012), as Percentage of Population*



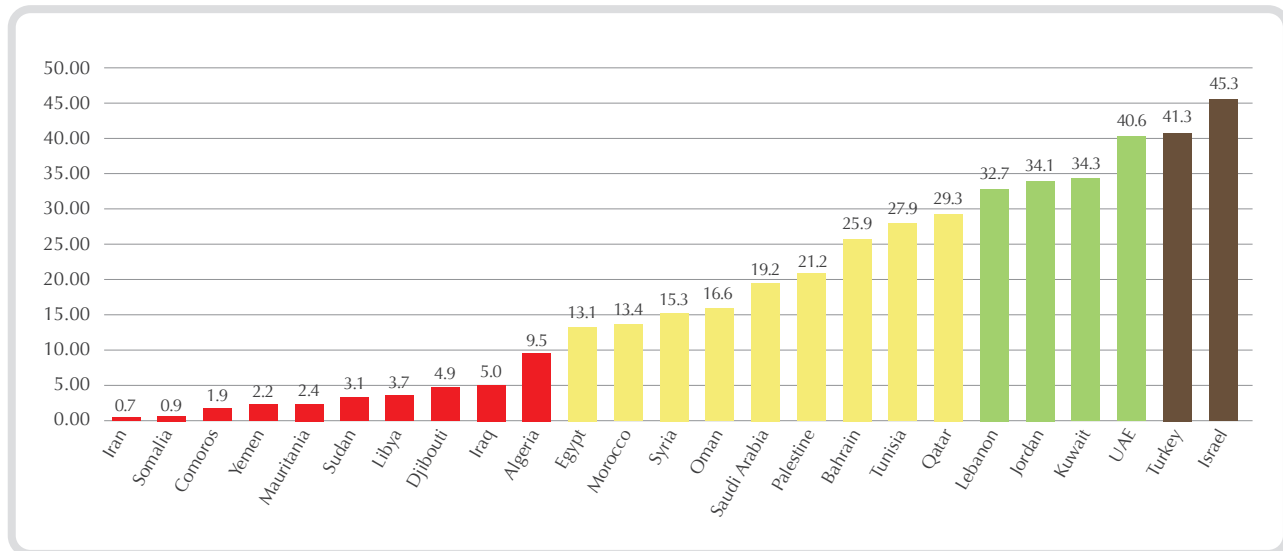
*2012 populations, from United Nations ILO Department of Statistics, <http://laborsta.ilo.org/>,

Figure 9: Number of New Facebook Users in the Arab Region, plus Iran, Israel and Turkey (Jan. 3 – June 25, 2012)



On a regional level⁹, the Arab countries can be divided into three groups according to their Facebook penetration rates (Figure 10):

Figure 10: Facebook User Penetration in the Arab Region, plus Iran, Israel and Turkey (June 2012)¹⁰



1. **High Penetration:** These countries' Facebook user penetration rates indicate persistent growth and a pervasive use of Facebook in their societies. (Facebook penetration between 30% and above)
2. **Emerging countries:** These countries' Facebook user penetration ranges from 10%-30%, indicating a medium penetration of Facebook users.
3. **Developing users:** These countries have low rates of Facebook user penetration, ranging from less than 1% to just under 10%, indicating room for growth.

The rankings show the continued dominance of the GCC countries in the top three spots, with Qatar being reintroduced –slightly edging out Tunisia - after displaying the highest growth in number of new users in the region within the past six months. The UAE continues to top the region in terms of Facebook penetration, just passing the 40% mark, and rivaling Turkey, one of the top ranking countries in the Middle East. Figure 11 highlights the numbers of Facebook users and their penetration as percentage of total Facebook users in the Arab world.

⁹ Turkey, Iran and Israel are also included for comparative purposes in this report, as Middle Eastern countries that share certain socio-economic and geopolitical characteristics with many Arab countries.

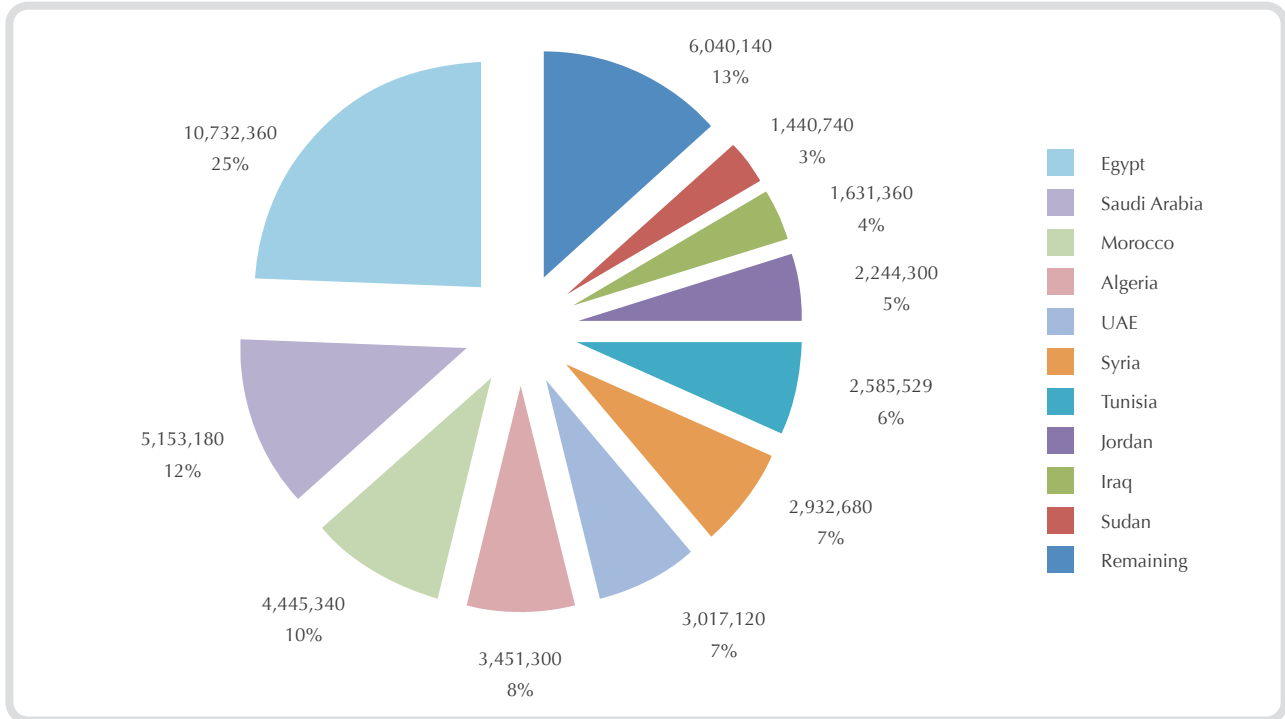
¹⁰ 2011 populations, from United Nations ILO Department of Statistics, <http://laborsta.ilo.org/>



Saudi Arabia and the UAE make up 80% of Facebook users in the Gulf region

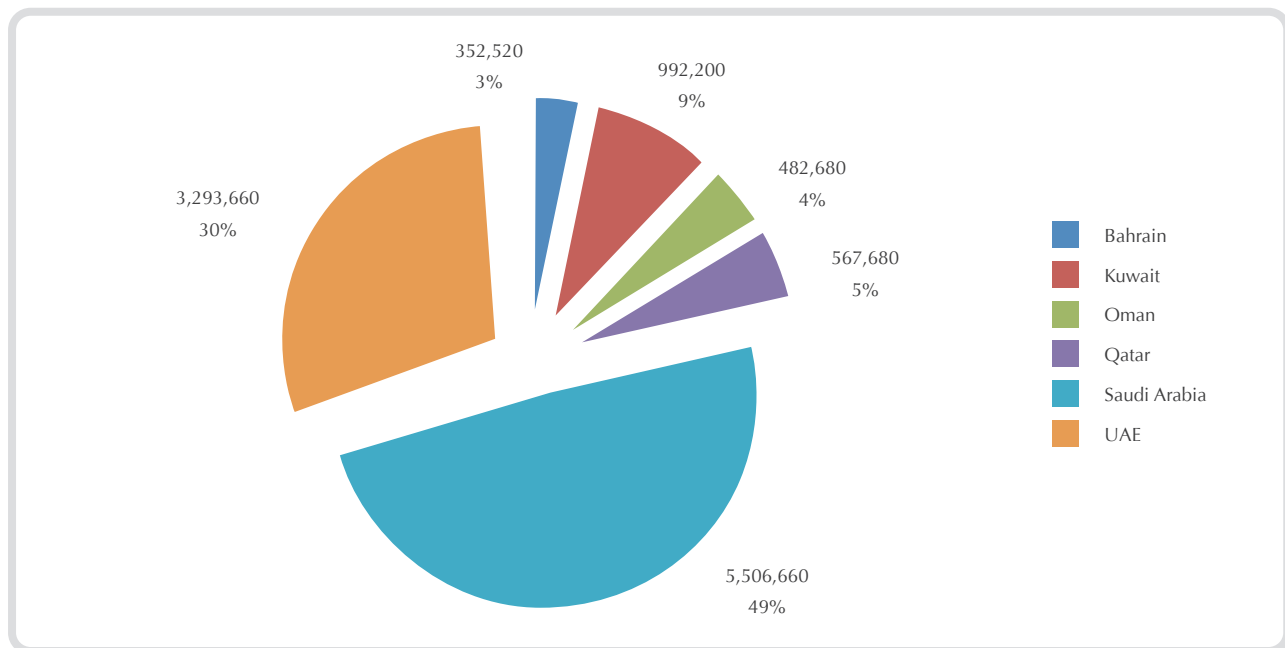


Figure 11: Number of Facebook Users and Percentage of Users in the Arab Region (June 2012)



Looking at the GCC countries specifically, **Figure 12** highlights the number and percentage of Facebook users in that region, indicating that Saudi Arabia and the UAE make up 80% of users in the Gulf region.

Figure 12: Number of Facebook Users and Percentage of Users in the Gulf Region (June 2012)

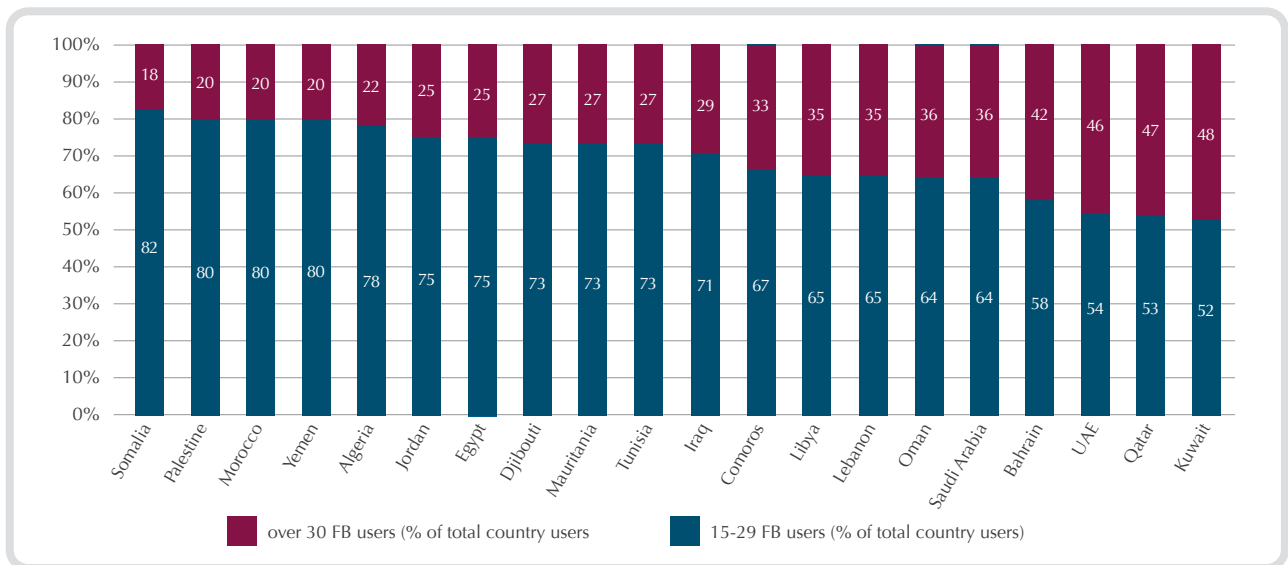


“ Youth (between the ages of 15 and 29) still make up around 70% of Facebook users in the Arab region, a number that has been holding steady since April 2011 ”

Demographic and gender breakdown of Facebook penetration

Youth (between the ages of 15 and 29) still make up around 70% of Facebook users in the Arab region, a number that has been holding steady since April 2011. Qatar and Kuwait have slightly edged out the UAE as the most balanced countries in terms of adult and youthful Facebook users. The GCC countries in general have more “mature” knowledge societies and are more balanced demographically than the rest of the Arab region, with countries such as Somalia, Palestine, and Morocco persistently having a predominantly youthful Facebook user population (see Figure 13).

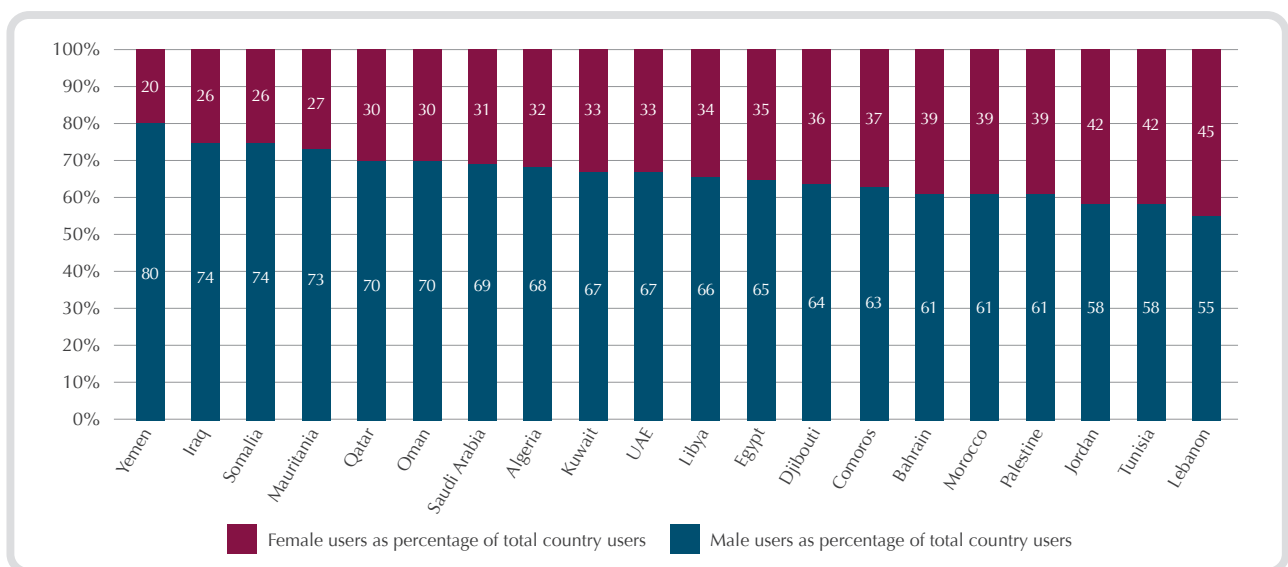
Figure 13: Demographic Breakdown of Facebook Users in the Arab Region* (June 2012)



*Excluding Syria and Sudan. Due to US imposed technology sanctions on both countries, no data on demographic breakdown of Facebook users could be obtained.

The **gender breakdown** of Facebook users shows that the percentage of female users has been fluctuating slightly since April 2011, at around 33.7%. This is still lower than the global trend, where women constitute **roughly half** of Facebook users (see Figure 14).

Figure 14: Gender Breakdown of Facebook Users in Arab Countries* (June 2012)



*Excluding Syria and Sudan. Due to US imposed technology sanctions on both countries, no data on demographic breakdown of Facebook users could be obtained.

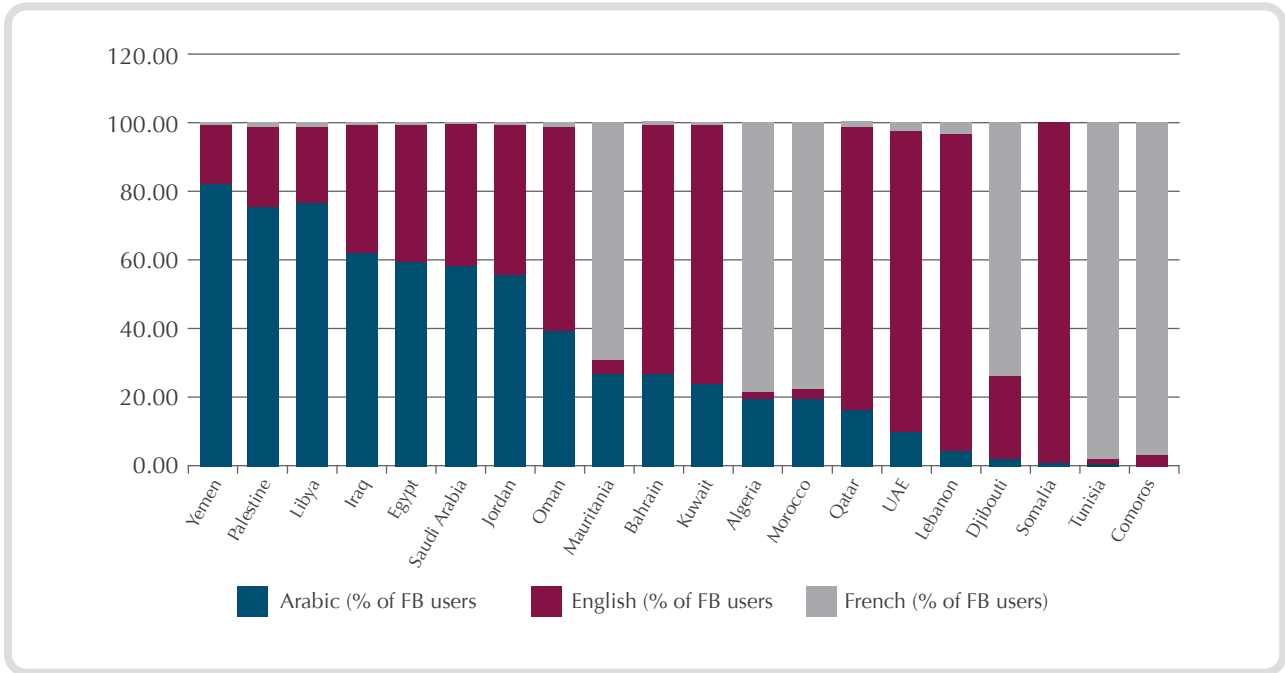
“ The percentage of female users has been fluctuating slightly since April 2011, at around 33.7%. This is still lower than the global trend, where women constitute roughly half of Facebook users ”

Lebanon is still the most gender-balanced of the Arab countries, followed closely by Tunisia, Jordan and Palestine, while at the other end of the spectrum Facebook users in Mauritania, Somalia, Iraq, and Yemen.

Language breakdown of Facebook users

Facebook users across the Arab region also vary in their preference of language interface. **Figure 15** highlights the three main languages used on Facebook in the region (Arabic, English and French) and the percentage of Facebook users that prefer to use each language interface.

Figure 15: Language Interface Preference for Facebook Users in the Arab World

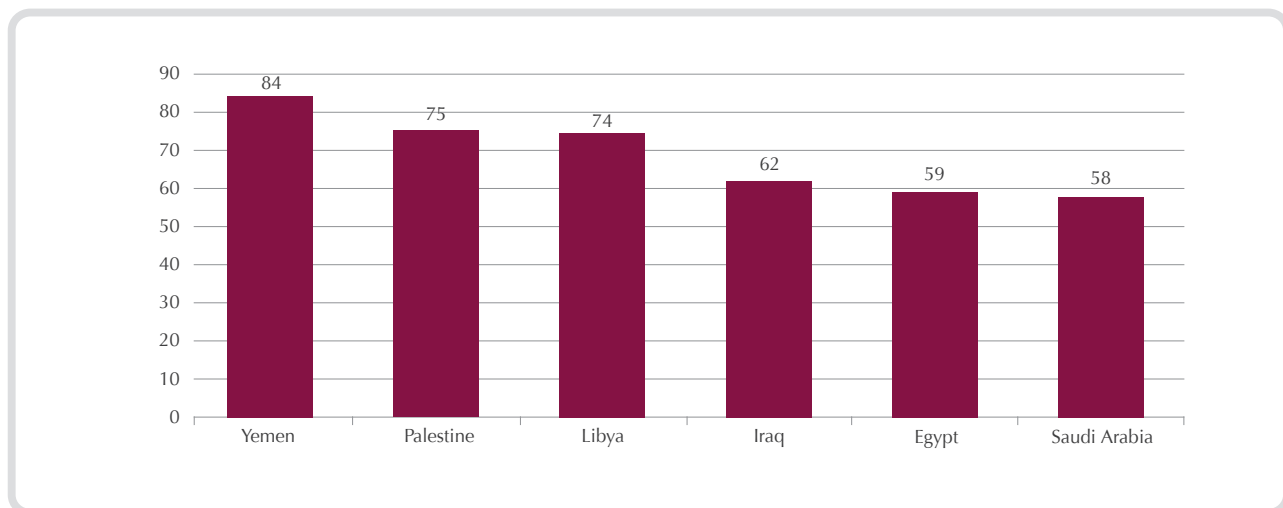


Language preferences across the region diverge considerably. Overall, the GCC countries (with the exception of Saudi Arabia) primarily prefer to use English on Facebook, most likely because of their large English-speaking expatriate population. North African countries (with the exception of Egypt) prefer to use French.

Interestingly, the percentage of users who prefer the Arabic interface has risen in several countries over the past year, namely in Egypt, Libya and Iraq (see Figure 16). The change in the latter two countries can be partly attributed in the past to shifts in the numbers of expatriates and foreign military presence, thereby decreasing the numbers of English-speaking users this time around. In Egypt, however, this increase points to a wider use of Facebook among the masses, and not just among the well-educated, English-speaking segment of society.

“ The percentage of users who prefer the Arabic interface has risen in several countries over the past year, namely in Egypt, Libya and Iraq, indicating a wider use of Facebook among the masses, and not just among the well-educated, English-speaking segment of society ”

Figure 16: Percentage of Facebook Users who prefer the Arabic User Interface



4. Mapping Twitter in the Arab World

The number of active Twitter users globally grew to over 500 million by February 2012, tweeting 2 billion tweets a week. As officially defined by Twitter, an “active user” is someone who logs in (but does not necessarily tweets) once a month.

Twitter penetration and uptake in the Arab region

The total number of active Twitter users and tweet volume in each of the 22 Arab countries (plus Iran, Israel and Turkey) over the month of June 2012 was estimated using a Twitter API (application programming interface) specially developed for this research. The methodology used is detailed in Annex 1. Briefly, it consists of sampling a certain number of Twitter users in each country captured across the month of March¹¹, and using this sample to extrapolate and estimate the active Twitter population in June (active in this case being defined as a user who has tweeted at least once a month¹²). The volume of tweets and top trends throughout March 2012 were also estimated.

- The estimated number of active Twitter users in the Arab region at the end of June 2012 was **2,099,706**.
- The estimated number of tweets generated in the Arab region in **March 2012** by “active users” was **172,511,590** tweets. The estimated number of daily tweets is **5,750,386 tweets per day**, or **3993 tweets a minute**, or **roughly 67 tweets every second**.
- The most popular trending hashtags across the Arab region in **March 2012** were **#bahrain** (with 2.8 million mentions in the tweets generated during this period) followed by **سوريا** (Arabic for Syria) with 1.5 million mentions, **بحرين** (Arabic for Bahrain) with 1.48 million mentions, **#syria** (with 1.3 million mentions) and **#egypt** (with 900,000 mentions), and **#kuwait** (with 860,000 mentions)

Turkey dominates in the number of Twitter users, with 589,260 users, followed by the Egypt, which leads the Arab countries with 129,711 Twitter users (see Figures 17 & 18). The top five Arab countries in terms of number of Twitter users are Egypt, Saudi Arabia and Kuwait, UAE and Lebanon. For the first time, a non-GCC country besides Egypt – in this case, Lebanon- has made its way into the top five, closely ahead of the previous fifth place ranking country, Bahrain.

¹¹ Refer to Annex 2 for March estimates

¹² Based on Twitter’s official definition of active users: <http://blog.twitter.com/2011/09/one-hundred-million-voices.html>

Figure 17: Number of Active Twitter Users in the Arab Region plus Iran, Israel and Turkey (Average number for June, 2012) – Countries with over 50K users

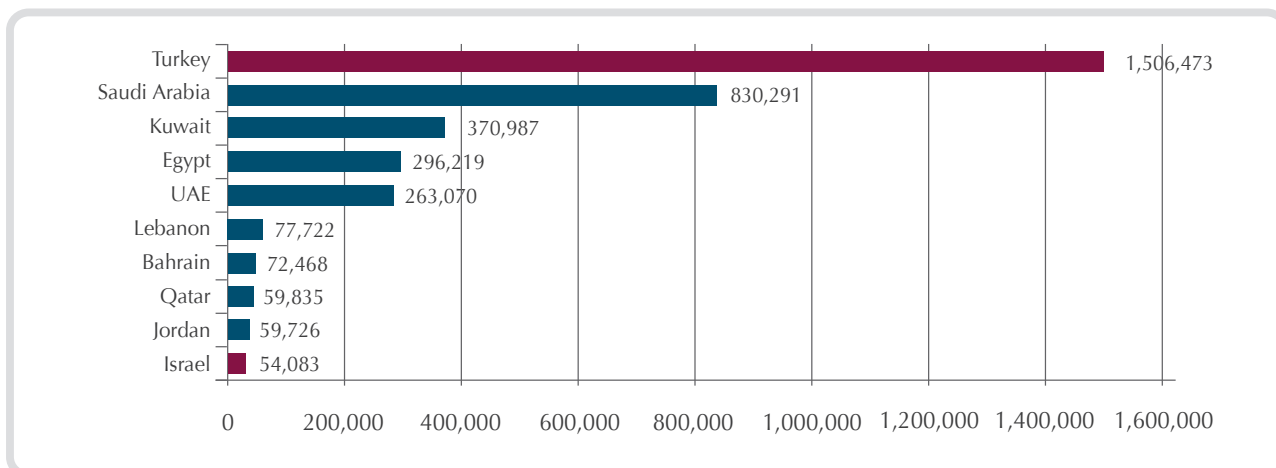
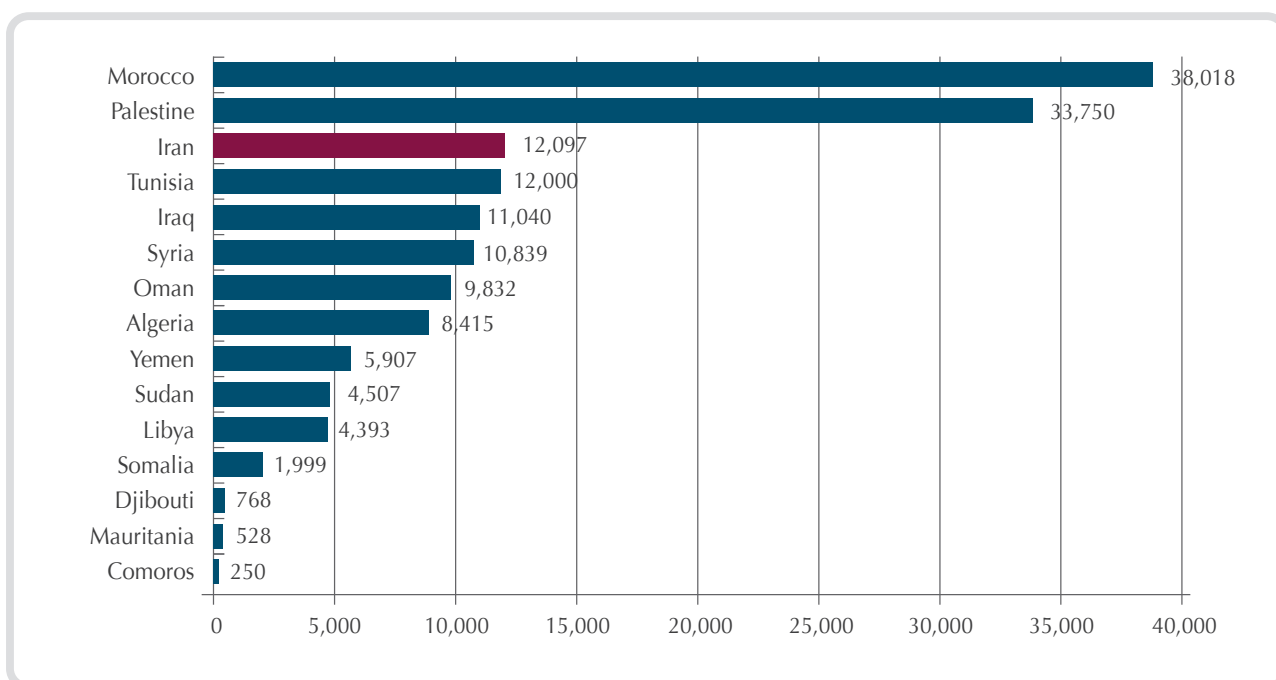


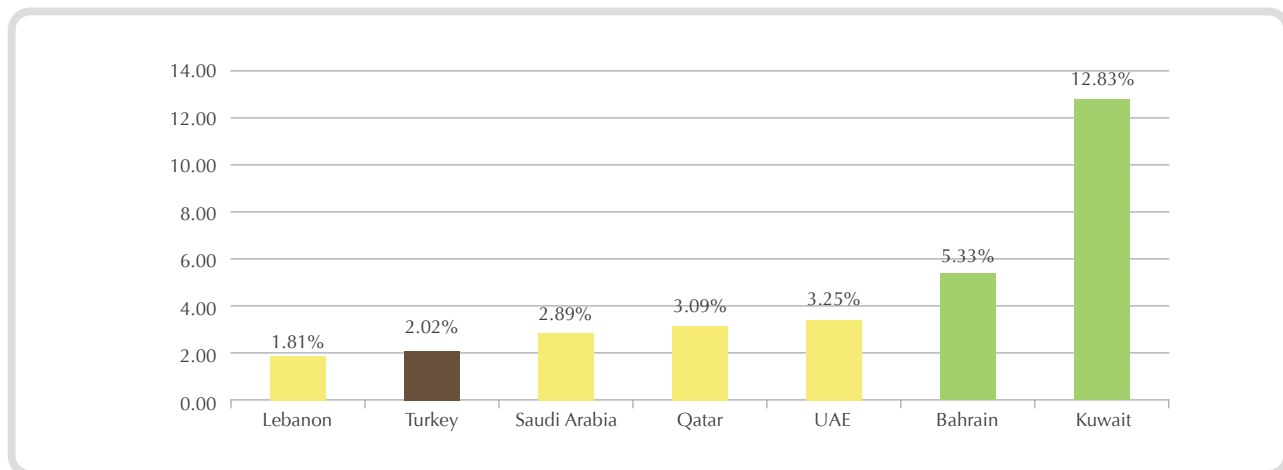
Figure 18: Number of Active Twitter Users in the Arab Region plus Iran, Israel and Turkey (Average number for June, 2012) – Countries with under 50K users



When it comes to Twitter penetration as a percentage of population on a regional level, Kuwait stands out with 12.83% Twitter penetration rate, followed by Bahrain at 5.33%. Contrary to Facebook, the top five countries in terms of Twitter penetration are all from the GCC, with UAE, Qatar and Saudi Arabia taking the remaining slots (Figures 19 & 20). Arab countries can be divided into the following categories:

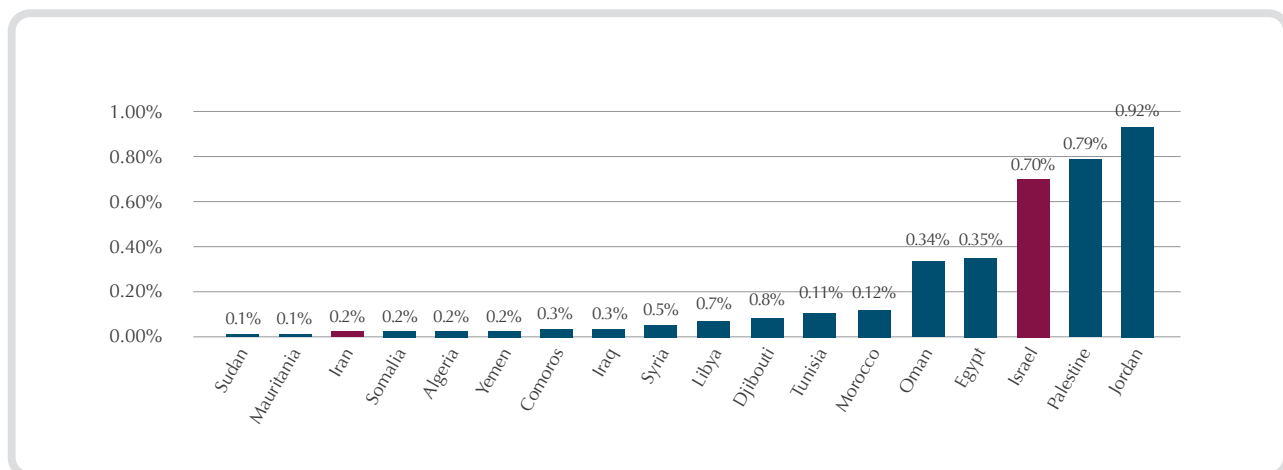
- High Penetration:** These countries' Twitter user penetration is above 5%, indicating a high use of Twitter in their societies relative to other Arab countries.
- Emerging countries:** These countries' Twitter user penetration ranges from 1%-5%, indicating a medium penetration of Twitter users relative to other Arab countries.
- Developing users:** These countries have Twitter user penetration rates are under 1%, indicating room for growth.

Figure 19: Twitter Penetration (above 1%) in the Arab Region plus Iran, Israel and Turkey (Average for June 2012)*



*2011 populations, from United Nations ILO Department of Statistics, <http://laborsta.ilo.org/>

Figure 20: Twitter Penetration (below 1%) in the Arab Region plus Iran, Israel and Turkey (Average for June 2012)*



*2011 populations, from United Nations ILO Department of Statistics, <http://laborsta.ilo.org/>

As with Facebook penetration, the populations used in calculating Twitter penetration are based on ILO statistics.

Volume of tweets in the Arab region

The volume of tweets from each country was estimated during the month of March (see Figures 21 & 22), and calculated as a percentage of total tweets in the Arab region over this time period.

The top five generators of tweets in the Arab region during this month are Kuwait, Saudi Arabia, Egypt, UAE, and Bahrain. Figure 23 shows that **88% of tweets in March 2012** were generated by these five countries.

88% of tweets in March 2012 were generated by Kuwait, Saudi Arabia, Egypt, the UAE and Bahrain

Figure 21 - Number of Tweets (over 1 million) in the Arab Region plus Iran, Israel and Turkey (March 1-30, 2012)

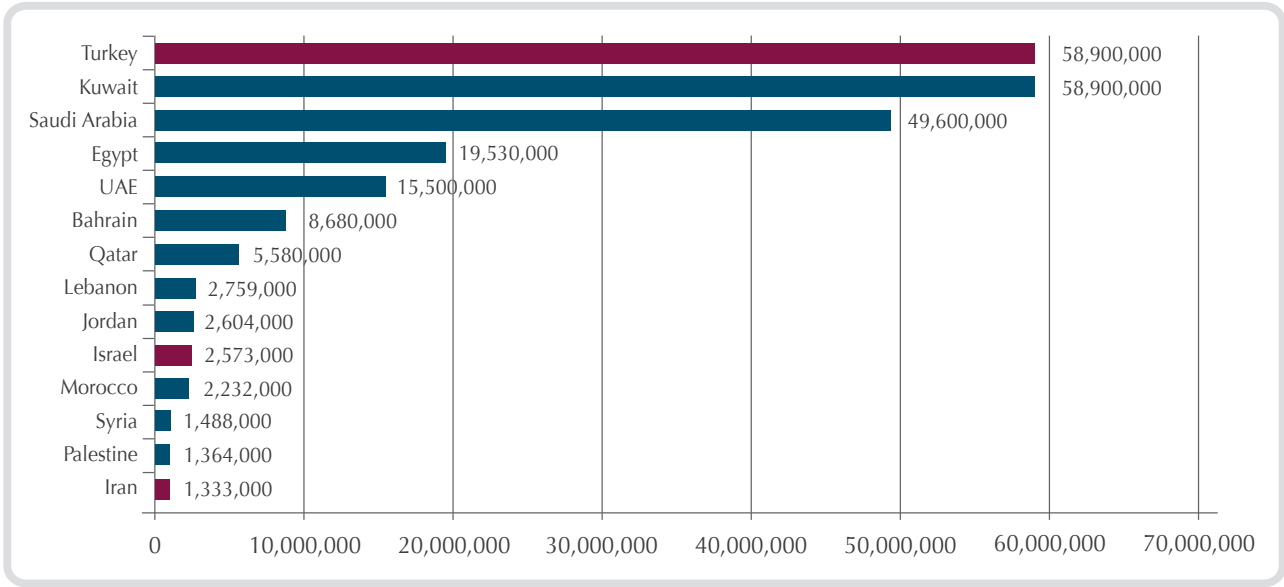


Figure 22 - Number of Tweets (under 1 million) in the Arab Region plus Iran, Israel and Turkey (March 1-30, 2012)

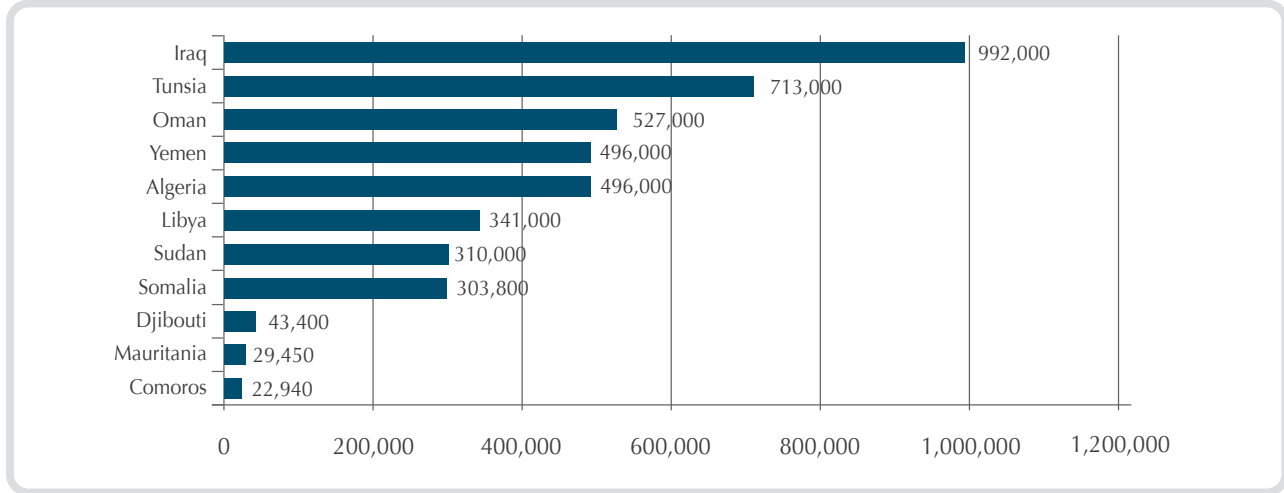
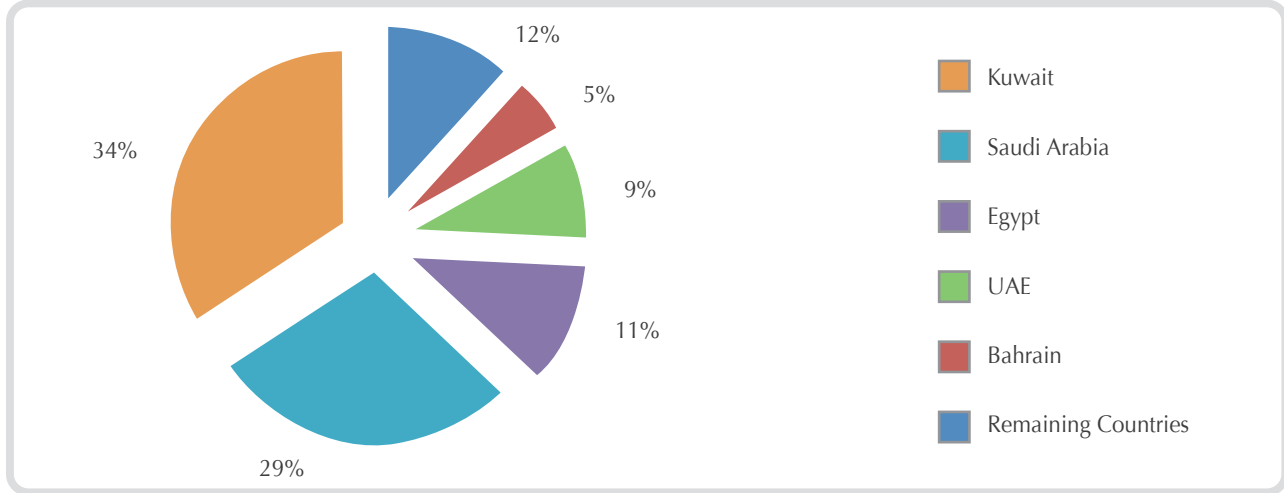


Figure 23: Percentage of Tweets in the Arab Region (March 1 –30, 2012)





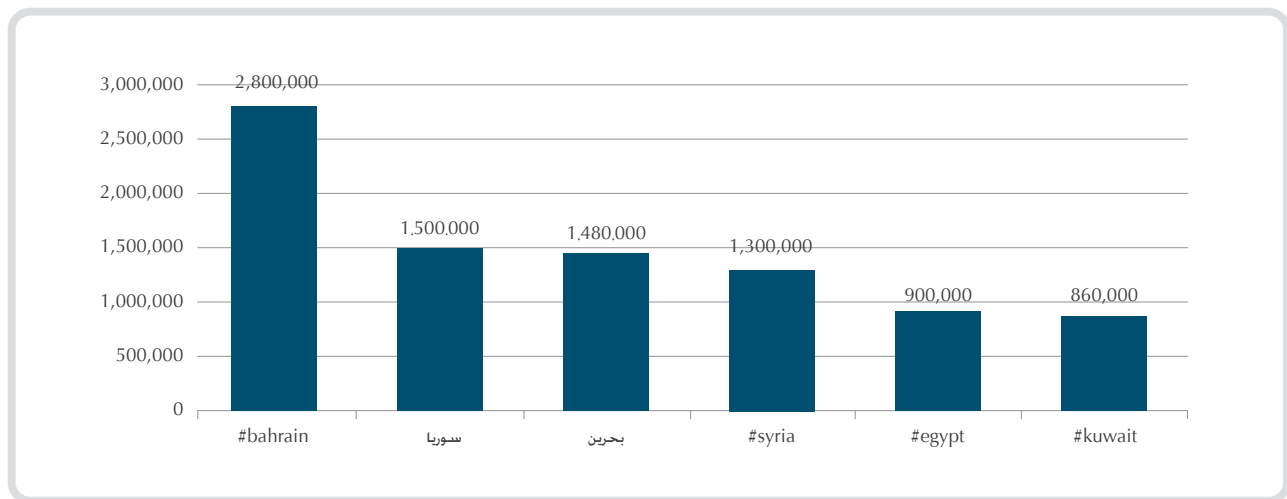
English and Arabic are the dominant languages for Twitter users in the Arab region, with Arabic tweets numbering almost double those in English through March 2012 (62.1% and 32.6% respectively)



Top Twitter trends in the Arab region

The top trends for each country were estimated during the months of February and March 2012. Across the region, the top five trending hashtags are illustrated in **Figure 24** below. The introduction of Arabic terms for the first time into the top trending phrases in the region is an indication of the fast growth of Arabic use on Twitter.

Figure 24: Top Twitter Trends in the Arab Region in Feb & March 2012 (number of mentions)

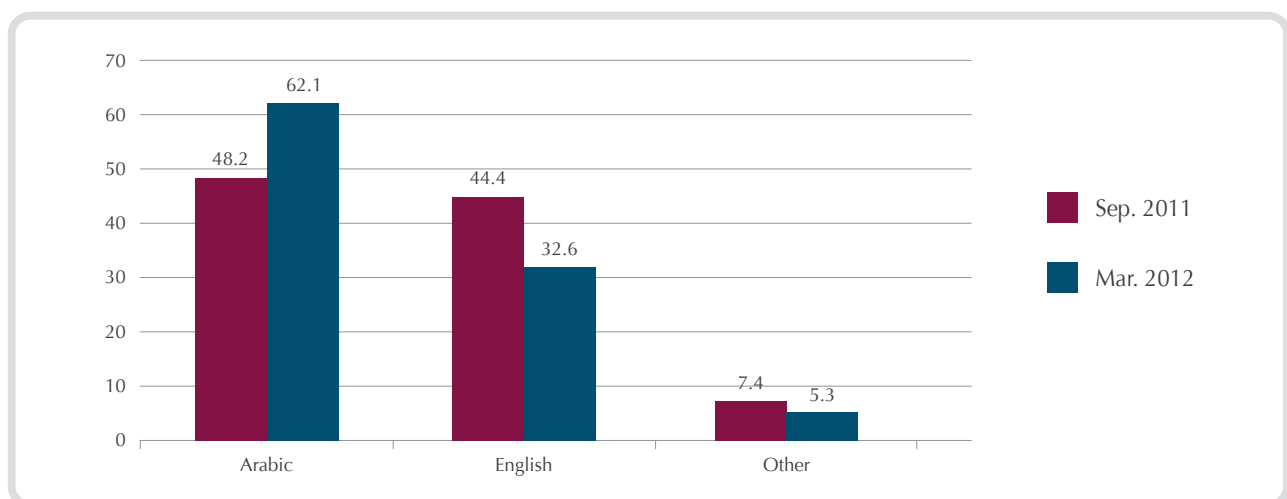


Language breakdown of Twitter users

English and Arabic are the dominant languages for Twitter users in the Arab region, with Arabic tweets numbering almost double those in English through March 2012 (62.1% and 32.6% respectively).

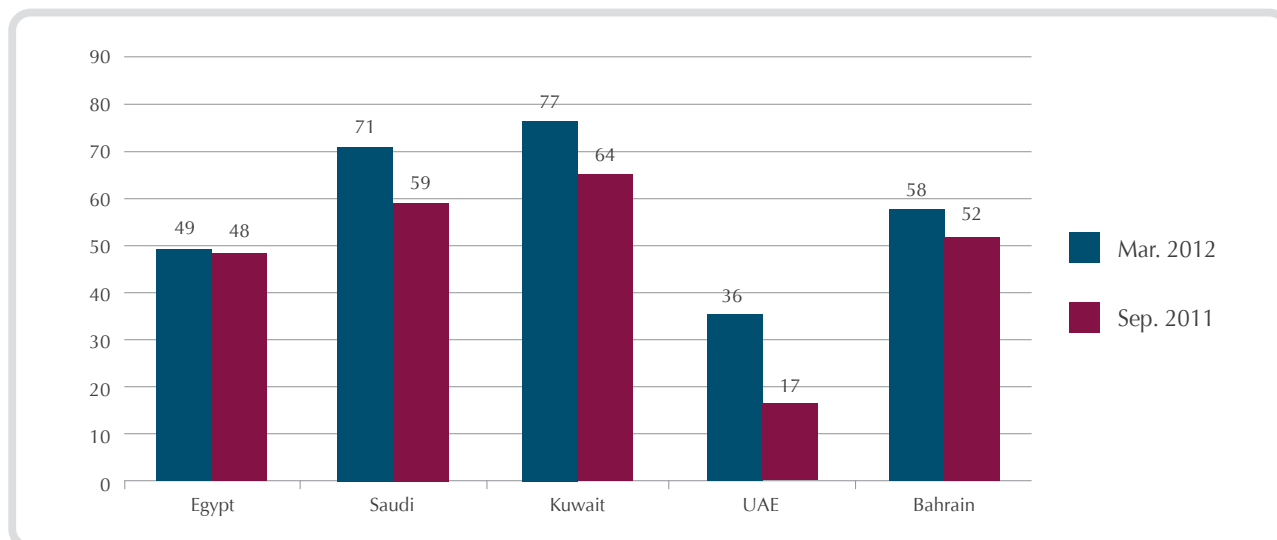
As with Facebook, the use of Arabic has grown on Twitter, with **Figure 25** illustrating the shift in language preference across the region, between September 2011 and March 2012.

Figure 25: Percentage of Tweets in the Arab Region by Language (Sep 2011 and March 2012)



Looking at the top Twitter users in the region, we can see this is the case in the top five Twitter populations, all of whom have seen an increase in the number of Arabic tweets between September 2011 and March 2012, even if only a slight one in the case of Egypt. (see Figure 26).

Figure 26: Percentage of Tweets in Arabic – Top Five Twitter Populations (Sep. 2011 and March 2012)



5. Mapping Linked in the Arab World - Users Growth in 2012

The number of active Twitter users globally grew to over 500 million by February 2012, tweeting 2 billion tweets a week. As officially defined by Twitter, an “active user” is someone who logs in (but does not necessarily tweets) once a month.

Twitter penetration and uptake in the Arab region

As of June 2012, the number of LinkedIn users, the professional social networking site, on a global level have exceeded 160 million users. Of these, data is only available for the following Arab countries: Algeria, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Morocco, Oman, Qatar, Saudi Arabia, Tunisia and the UAE. This covers all GCC countries, North African countries (excluding Libya and Mauritania) in addition to Lebanon and Jordan.

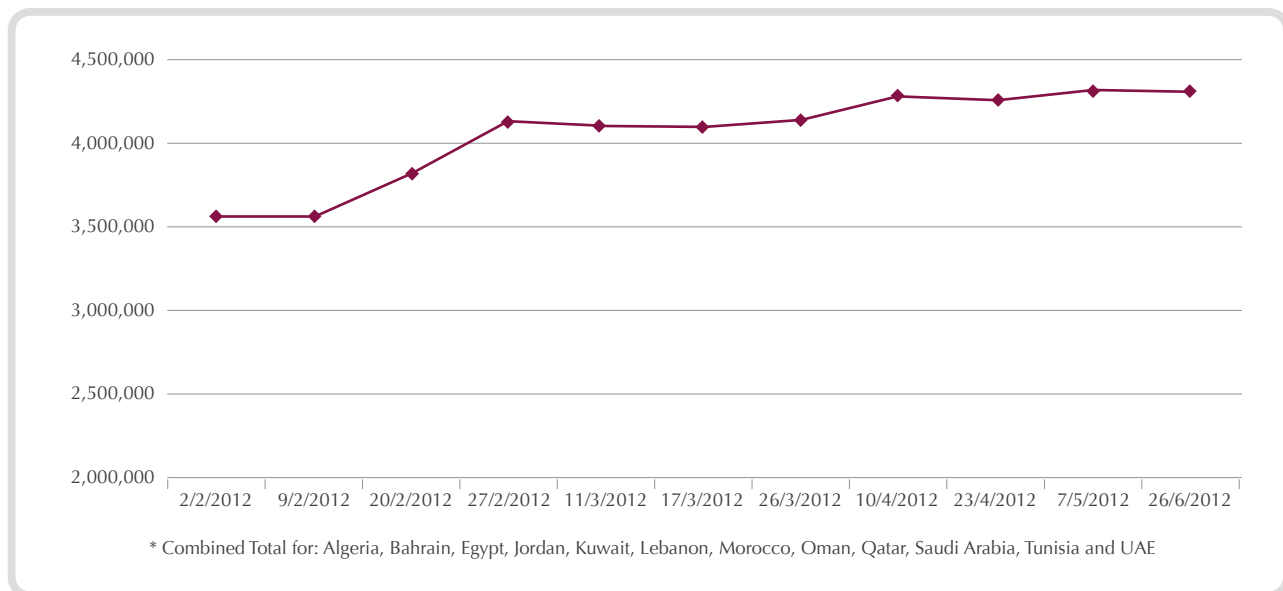
Penetration and uptake

LinkedIn in the Arab World: A Snapshot

- The total number of LinkedIn users in the Arab world¹³ stands at **4,294,484 (as of end June, 2012)**, up from **3,588,215** at the beginning of the February. (see Figure 27)
- By the end of June 2012, the country average for LinkedIn user penetration in the Arab region **was approximately 2%**.
- The number of LinkedIn users in the Arab world **has grown by 20% between** February and June 2012).
- Similarly to Facebook, the percentage of female users is lower than that of the men, at **28%**. This is also significantly lower than the global trend, where women constitute **43%** of LinkedIn users.
- **Young people** (between the ages of 18 and 34) make up **around 70% of LinkedIn users**, and similarly to Facebook, seem to be the driving force behind the growth of LinkedIn. Interestingly, of this segment, the university students and fresh graduates make up a much smaller percentage than young people who are more established in their careers

¹¹ Algeria, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Morocco, Oman, Qatar, Saudi Arabia, Tunisia and the UAE.

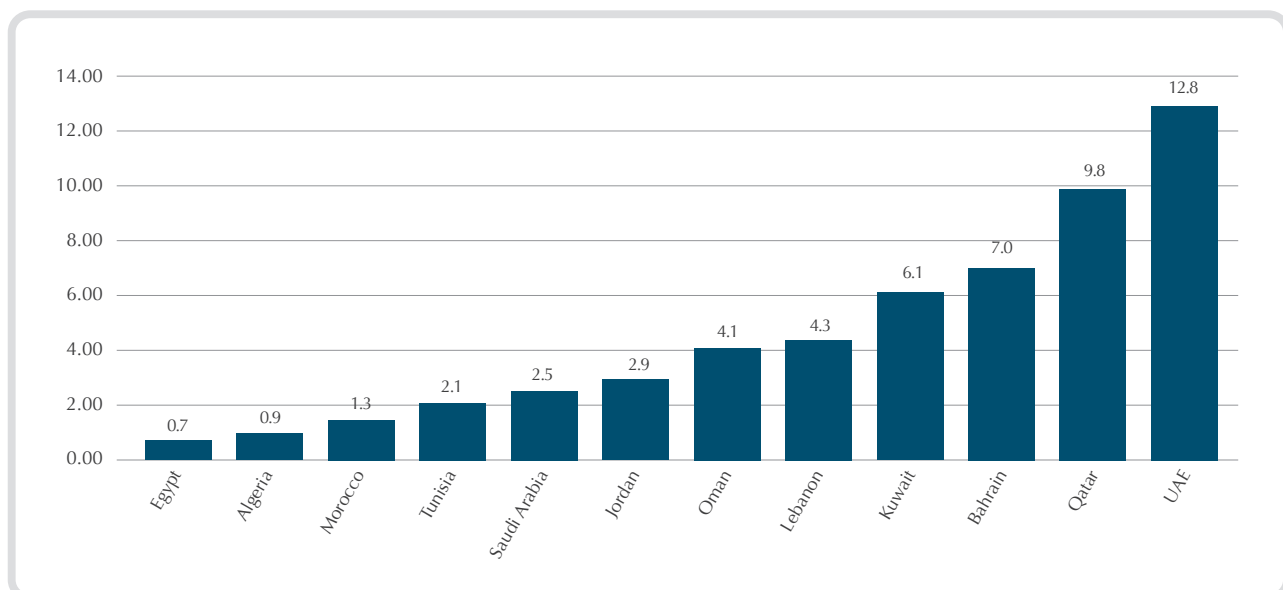
Figure 27: Number of LinkedIn Users* in Selected Arab Countries (Feb – June 2012)



LinkedIn penetration varies across these countries, with the UAE ranking at the top - as it does with Facebook penetration as well - in this case, with a rate of 12.8% (see Figure 28).

“LinkedIn is more popular with young and established professionals than it is with university students and fresh graduates, in the Arab region”

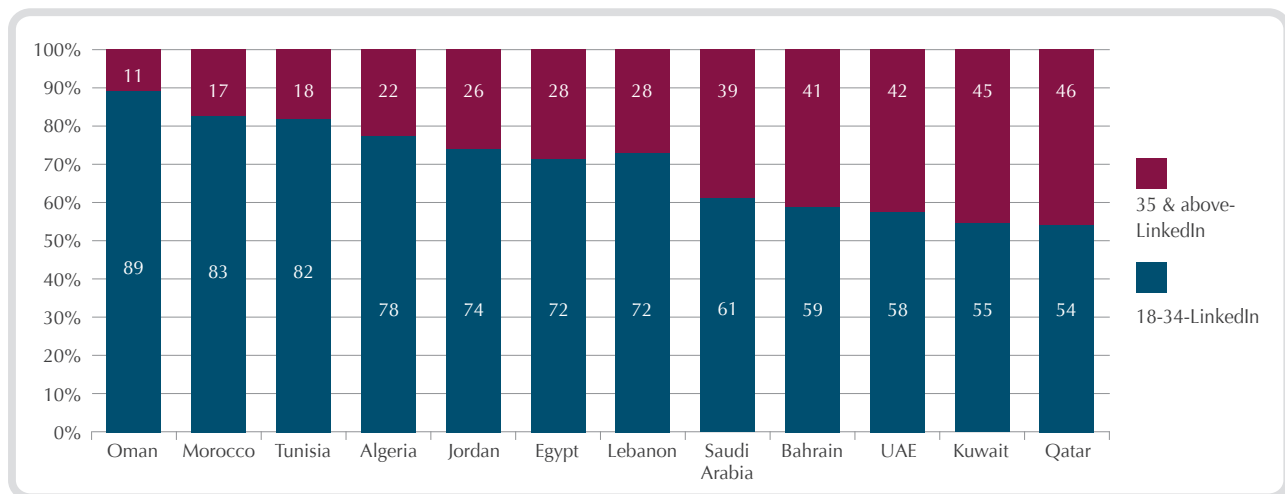
Figure 28: LinkedIn Penetration in Select Arab Countries as a Percentage of Population – June 2012



Demographic and gender breakdown of LinkedIn penetration

As with Facebook, youth (in this case 18-35 year-olds) make up the majority of LinkedIn users, at 72.2%. The GCC countries, with the exception of Oman, are more balanced in terms of youthful and adult users, while North African countries, Algeria, Tunisia and Morocco have predominantly young users (see Figure 29). Interestingly, it is the 25-34 age bracket that makes up two thirds of these youth, indicating that LinkedIn is more popular with young and established professionals, than it is with university students and fresh graduates, in the Arab region.

Figure 29: Demographic Breakdown of LinkedIn Users in the Select Arab Countries (June 2012)



When it comes to Arab women on LinkedIn, much like Facebook, their usage is well below the global average (in this case, 27.2% compared to the global female average of 42.6%). Lebanon is, as with Facebook, the most gender-balanced of the Arab countries when it comes to LinkedIn usage, while most of the GCC countries, have predominantly male users, with Saudi Arabia being the country with the most male dominated users base, reflecting the realities of job market in the kingdom. (see Figures 30 & 31)

Figure 30: Gender Breakdown of LinkedIn Users in the Select Arab Countries (June 2012)

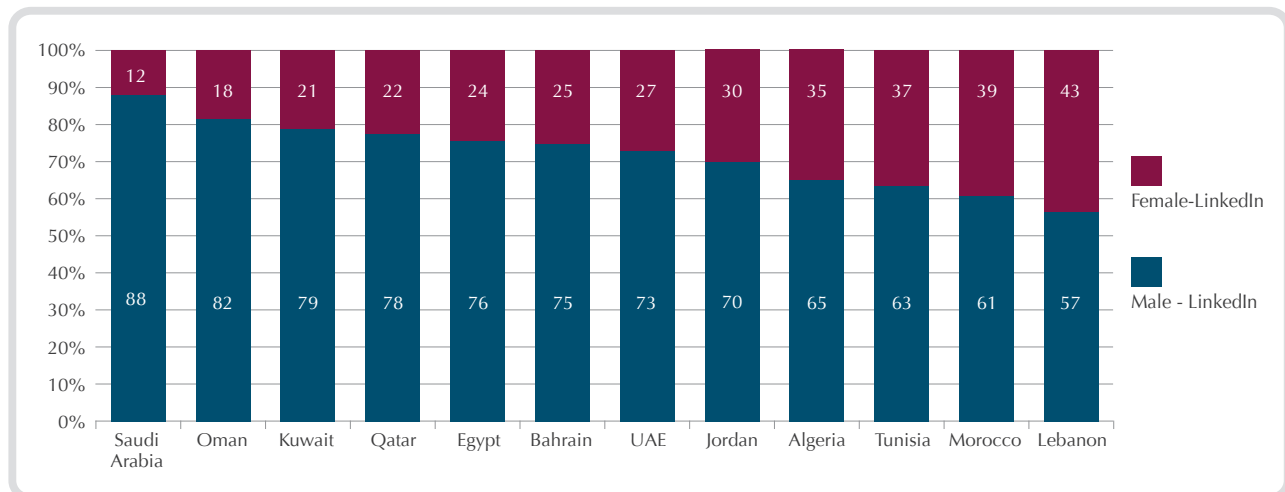
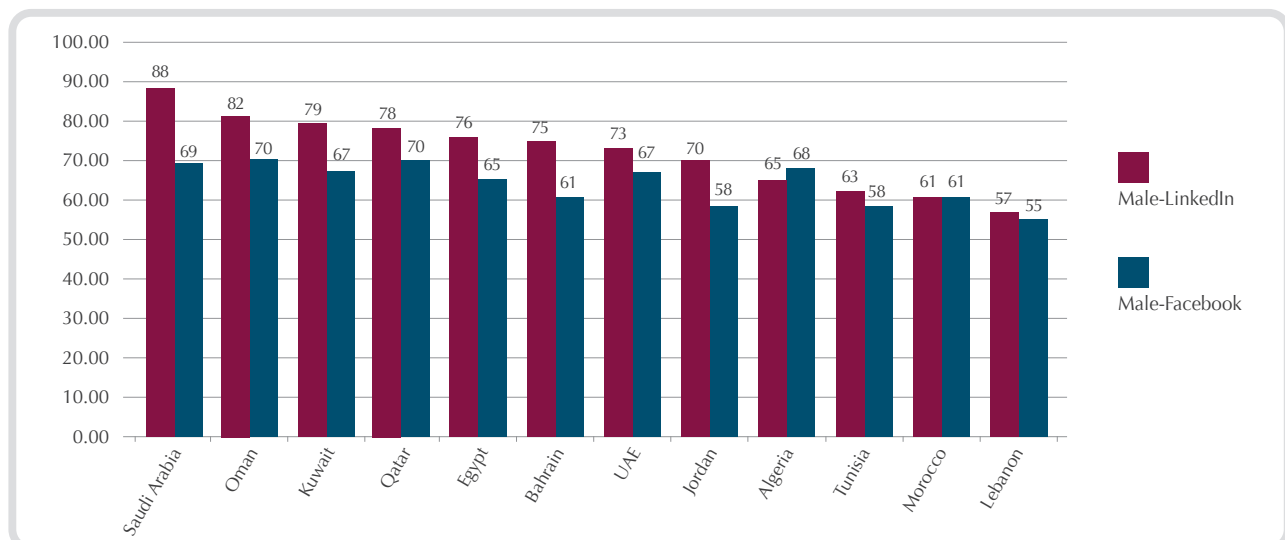


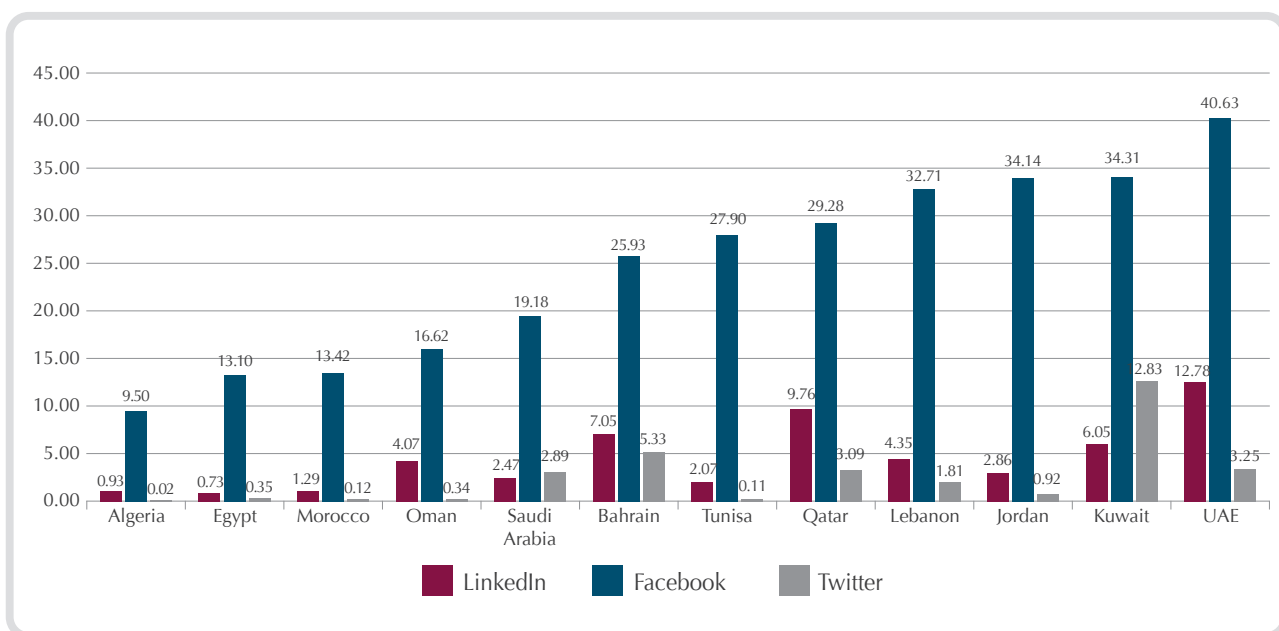
Figure 31: Percentage of Male LinkedIn and Facebook Users in Select Arab Countries (June 2012)



In comparing the penetration rates of different popular social media sites in select Arab countries (see Figure 32), Facebook clearly is at the forefront, and despite the breadth of impact and exposure Twitter has had throughout the Arab spring and beyond, its penetration remains behind that of LinkedIn - except in Kuwait – indicating that job hunting and professional networking services through LinkedIn are more relevant than the informational, social and political uses of social media that Twitter provides.

“ The percentage of female LinkedIn users is lower than that of the men, at 28%, and is also significantly lower than the global trend, where women constitute 43% of LinkedIn users ”

Figure 32: Penetration of Social Media Users in the Select Arab Countries (June 2012)



“ Twitter penetration remains behind that of LinkedIn - except in Kuwait – indicating that job hunting and professional networking services through LinkedIn are more relevant in the region than the informational, social and political uses of social media that Twitter provides ”

A Snapshot: Youtube and Google+ in the Arab World

The video-sharing platform Youtube, has played a key role during the so called 'Arab spring', boosting citizen journalism potential to unprecedented terrains in the region. It is arguably the primary social networking platform that effectively established the strong convergence between traditional broadcast media and social media in the Arab region. **Box 1** below provides a snapshot on the use of YouTube and Google+ in the Arab region:

Penetration and uptake

A Snapshot: Youtube and Google+ in the Arab World

- YouTube playbacks doubled in the last year in the Arab region
- There are 167 million video views a day in the Arab region, putting the region in the number two spot in the world (behind the U.S. and ahead of Brazil). Views in the region have grown by 120% in the last six months.
- One hour of YouTube video is uploaded in the Arab region per minute
- There are 90 million video views in Saudi per day (the highest number of YouTube views in the world per Internet user)
- Saudi Arabia leads the region with the most playbacks followed by Egypt, Morocco and UAE
- Country specific data of YouTube usage in 2011 versus 2010:
 - Saudi Arabia: uploads jumped 200% - views increased 260%
 - Egypt: uploads jumped 150% - views increased 220%
 - Tunisia: #uploads increased 420% - uploads increased 100%
 - Yemen: # views jumped 150%
 - Jordan: # uploads increased 140% - views increased 240%

Saudi Arabia - User Profile:

50% of YouTube users are women

The age of the average YouTube user is 33 years old

36% of YouTube users have a university degree

65% of YouTube users access the internet via a smartphone

Egypt - User Profile:

41% of YouTube users are women

The age of the average YouTube user is 35 years old

67% of YouTube users have a university degree

28% of YouTube users access the internet via a smartphone

19% of these users access YouTube via their smartphones

Regional Overview of Facebook, Twitter and LinkedIn

- **Facebook** has seen exponential growth in the Arab region, growing by 50% in six months. Country rankings have changed slightly since last September, with Qatar regaining a place in the top five ranking (edging out Tunisia), while Levant countries like Lebanon and Jordan still maintained their positions, and UAE and Kuwait continued to lead in terms of Facebook penetration
- Female participation in Facebook usage remains low, at 33.7%, as compared with the global female percentage of Facebook users (roughly 50%).
- Youth between 15 and 29 years of age continue to drive the growth of Facebook in the region, comprising 70% of Facebook users.
- When it comes to **Twitter** usage, Lebanon has climbed into the top five countries in terms of active Twitter users, edging out Bahrain, although GCC countries (specifically, Saudi Arabia, the UAE and Kuwait) continue to figure strongly, along with Egypt.
- Both Facebook and Twitter have shown strong growth in numbers of Arabic users and content posted in Arabic, indicating that these tools are being adopted by broader segments of society and not just those with a specific level of education and knowledge of English
- **LinkedIn** has also seen growth throughout the first half of 2012¹⁴, with penetration rates that surpass those of Twitter in all these countries (except for Kuwait).
- The percentage of female LinkedIn users is lower than that of the men, at 28%, and is also significantly lower than the global trend, where women constitute 43% of LinkedIn users.
- Young people (between the ages of 18 and 34) make up around 70% of LinkedIn users, and seem to be the driving force behind the growth of LinkedIn. Interestingly, of this segment, the university students and fresh graduates make up a much smaller percentage than young people who are more established in their careers



There are 167 million YouTube video views a day in the Arab region, putting the region in the number two spot in the world (behind the U.S. and ahead of Brazil). Views in the region have grown by 120% in the last six months



¹⁴ In the following countries (Algeria, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Morocco, Oman, Qatar, Saudi Arabia, Tunisia and the UAE)

Annex 1

Facebook data

The number of Facebook users in all 22 Arab countries, in addition to Iran, Israel and Turkey, was collected periodically between January 3 and June 25, 2012, with breakdowns for men and women, and in the following age brackets—youth (15-29), and adults (30 and over).

Raw data on for all Arab countries was collected and aggregated based on Facebook's official data (Group A), excluding Syria, Sudan and Iran (Group B), for which data was extracted from a source other than Facebook. Due to US imposed technology export sanctions, no data on the number of Facebook users in Syria, Sudan and Iran is available. The actual numbers of Facebook users in Syria and Iran (in November 2007 and June 2008, respectively) were located through online research; no such data for Sudan was found. For that reason, all Facebook data on Sudan in this report was estimated using the daily growth rate of Arab users (calculated from the Group A countries over two different periods for different reports - between January 5 and April 5, 2011 and between January 3 and April 3, 2012). This rate was used to calculate the number of users in group B, for consistency's sake, to ensure a smaller error margin than using the growth rates of similar countries for each individual country.

For Syria, specifically, after February 7, 2011, when social media sites were no longer banned in the country, a different daily growth rate was used to reflect the ensuing surge in growth number of Facebook users. This rate was based on the average daily growth rate in Yemen, which has a similar ICT and socio-economic indicators as Syria and witnessed an uprising influenced by Facebook and other social media networks as well. In addition, a one-off factor was added to the calculation of the Syria growth rate after lifting the ban on social media website on February 7, 2011. This was estimated based on the surge in number of Facebook users in Egypt after a similar Internet ban was lifted on 2nd February 2011. In order to maintain accuracy, the average daily growth rate for Yemen was recalculated at several points in time and applied to generate the number of Syrian Facebook users.

It should be noted that for all charts in this paper, the numbers of Facebook users in Syria, Sudan and Iran are estimates, while the numbers for remaining countries were compiled based on official Facebook data.

Twitter data

The number of Twitter users, number of tweets, and top trends in all 22 Arab countries, in addition to Iran, Israel and Turkey, was estimated between February 8th and 30th, 2012 by sampling **85,900 Twitter users and 1.96 million tweets**. The study was conducted using a specially developed Twitter API. Additionally, the number of Twitter users in June 2012, was estimated using the growth rate between the previous two sampling periods September 2011 and March 2012.

Two sampling methods were used:

1. Trend & volume data was collected by sampling 1% of the whole of Twitter traffic, and filtering for location.
2. Users were sampled by randomly inspecting user ID numbers. This allows for finding information on both active and inactive users.

The population estimates come from combining these two data sources (sample (2) gives a picture of user behavior, which helps assess the fraction of the population that was picked up in sample (1)). An estimated correction was applied for un-locatable users.

Data collection was done by filtering the Twitter sample stream (which provides 1% of all tweets as they happen) for tweets from the right country. An unbiased distribution of tweet frequency was obtained by random sampling of the user space.

Geo Location (identifying the country from a location) was done by filtering tweets with location information using a mixture of Yahoo and Google's geolocation services, plus a local database & some extra clean-up for mistakes by one of these services.

Population estimation was done by estimating the probability of seeing a given user appear in the stream, given the sampling period, tweet-frequency distribution, and the stream behavior (witnessed in the 1% sample of tweets; assumed unbiased). A second correction was applied for un-locatable users.

LinkedIn data

The number of LinkedIn users in 12 Arab countries¹⁵: Algeria, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Morocco, Oman, Qatar, Saudi Arabia, Tunisia and the UAE, was collected periodically between February 2nd and June 26th, 2012, with breakdowns for men and women, and in the following age brackets: 18-24, 25-34, 35-54, 55 and above.

¹⁴ These are the only Arab countries for which the LinkedIn website provides data. Of these, Algeria, Lebanon, Morocco, Oman and Tunisia were only introduced in June 2012.

Annex 2

The content of Annex 2 is available exclusively for members of the ASMR community online on the ASMR website:

www.ArabSocialMediaReport.com

Join the Arab Social Media Report community online. Registration (at no cost) will give you access to the following datasets, in addition to unpublished charts:

Facebook Users and Country Populations in the Arab World - June 2012

*2012 populations, from United Nations ILO Department of Statistics, <http://laborsta.ilo.org/>

Country	Number of Facebook users (6/26/2012)	Population*	Facebook Penetration (%)	Number of New Facebook users since 1/3/2012 (%)	Growth in number of Facebook users since 1/3/2012 (%)	New Facebook users since 1/3/2012 (as % of population)
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Volume of Tweets and Twitter users in the Arab Region Q1 - 2012

*2012 populations, from United Nations ILO Department of Statistics, <http://laborsta.ilo.org/>

Country	Estimated Number of Twitter Users (Avg. through June, 2012)	Population*	Twitter penetration (Avg.through June, 2012)	Estimated Tweet Volume (Avg. through March 2012)
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LinkedIn Users and Country Populations in Select Arab Countries – June 2012

*2012 populations, from United Nations ILO Department of Statistics, <http://laborsta.ilo.org/>

Country	Number of LinkedIn Users (6/26/2012)	Population*	LinkedIn penetration (%)
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Social Media, Internet and Mobile Subscription Rates in the Arab Region - June 2012

*2012 populations, from United Nations ILO Department of Statistics, <http://laborsta.ilo.org/>

** ITU statistics 2011 <http://www.itu.int/ITU-D/ICTEYE/Indicators/Indicators.aspx>

Country	Estimated Number of Twitter Users (Avg. through June, 2012)	Twitter penetration (%)*	Number of Facebook users (6/26/2012)	Facebook penetration (%)*	Number of LinkedIn Users (6/26/2012)	LinkedIn penetration (%)*	Internet users per 100**	Mobile subscriptions per 100**
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Language interface Preferred by Facebook Users* (as a percentage)- Ranked by Arabic

*2012 populations, from United Nations ILO Department of Statistics, <http://laborsta.ilo.org/>

Country	Arabic (% of Facebook users)	English (% of Facebook users)	French (% of Facebook users)
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Percentage of Facebook Users who prefer the English User Interface (chart)

Percentage of Facebook Users who prefer the French User Interface (chart)

About the Authors

The Arab Social Media Report series is produced by DSG's Governance and Innovation Program, and co-authored by Racha Mourtada and Fadi Salem.

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About the Governance and Innovation Program

The Governance and Innovation Program at DSG conducts research and programmatic activities focusing on policies for government innovation and development through information technologies in the Arab states. The objectives of the program are aligned with regional objectives towards nurturing a culture of innovation in society, promoting participatory, inclusive and transparent government models; and enabling more responsive and efficient governance through effective adoption of information technologies.

The program works on three tracks:

- 1. Policy and Scholarly Research:** Conducting research focusing on government policies and societal transformation through technological innovation in the Arab region.
- 2. Policy Advisory:** The ultimate objective of the Program is to inform present and future Arab policy makers in assessing the impact of the ongoing transformations in their societies and governments; and to help develop locally fitting policies for future governance initiatives.
- 3. Regional Development Activities:** The Program brings together regional and international networks of practitioners and scholars working in related areas through programmatic and educational activities, in order to encourage proactive regional knowledge sharing and bridge the gap between policy and research.

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The Dubai School of Government (DSG) is a research and teaching institution focusing on public policy in the Arab world. Established in 2005 under the patronage of HH Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the United Arab Emirates and Ruler of Dubai, in cooperation with the Harvard Kennedy School, DSG aims to promote good governance through enhancing the region's capacity for effective public policy.

Toward this goal, the Dubai School of Government also collaborates with regional and global institutions in its research and training programs. In addition, the School organizes policy forums and international conferences to facilitate the exchange of ideas and promote critical debate on public policy in the Arab world. The School is committed to the creation of knowledge, the dissemination of best practice and the training of policy makers in the Arab world. To achieve this mission, the School is developing strong capabilities to support research and teaching programs including

- applied research in public policy and management;
- master's degrees in public policy and public administration;
- executive education for senior officials and executives; and,
- knowledge forums for scholars and policy makers.



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